Telework & Flex-Schedules

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1. INTRODUCTION

Alternate Work Schedules have a number of benefits for both employers and employees. Alternate Work Schedules may include programs like voluntary time off, flex-schedules—which allow for 9/80 or 4/10 work weeks—or flexible hours to allow employees to come in and leave either earlier or later. They may also include telework, which allows employees to work offsite, often from home. Employees tend to see these programs as benefits, allowing them greater flexibility, work/life balance, and cost savings from less driving. Employers often see these programs as potential recruitment and retention tools, a new way of doing business, offering continuity of services during emergencies, and a way to reduce greenhouse gas emissions for a relatively low cost.

The County of San Mateo is a large employer, with more than 5,000 employees. While the County had offered telework and flex-schedules for a number of years, a 2009 employee survey showed that only 196 employees participated in telework, with most teleworking less than once a week. In the County's 2010 Greenhouse Gas Inventory for Government Operations, employee commutes were the second largest contributor to greenhouse gas emissions, accounting for 33% of the County's greenhouse gas emissions from government operations. In the County's 2012 Climate Action Plan for Government Operations, the County identified Alternate Work Schedules as one cost-effective strategy for reducing greenhouse gas emissions associated with employee commutes.

The San Mateo County Transit District (SamTrans) received a Metropolitan Transportation Commission (MTC) Climate Initiatives Grant to pilot implementation of a suite of transportation demand management strategies through the Connect, Redwood City! program. As a partner agency, the County received grant funding in 2012 to re-launch its telework and flex-schedules and to develop trainings and a telework toolkit as a resource for other local governments and businesses in the region interested in exploring Alternate Work Schedules. With 71 percent of commuters in San Mateo County driving alone to work[1] and growing traffic congestion, these resources can help agencies and businesses consider how they might implement Alternate Work Schedules.

[1] "Indicators for a Sustainable San Mateo County." Sustainable San Mateo County. 2014.

2. WHAT IS TELEWORK?

The terms telecommuting and teleworking were first coined in 1973 by Jack Nilles, a former rocket scientist from California, during the first documented pilot telecommuting project. Mr. Nilles organized and led an interdisciplinary team at the University of Southern California to develop and test telecommuting in a real-world environment with a major national insurance company.

Telework Defined

The original definitions of these terms are:

- **Telework:** ANY form of substitution of information technologies (telecommunications and computers) for work-related travel.

- **Telecommuting:** That portion of teleworking that applies to the daily commute to and from work-a primary source of traffic congestion, air pollution and loss of productivity in urban areas.

Today, these terms are often used interchangeably, with some preferring telework since the emphasis is on "work," rather than "commuting." A more recent definition of telework can be found in the federal Telework Enhancement Act of 2010, which establishes requirements for teleworking throughout the federal government:

> The term "telework" or "teleworking" refers to a work flexibility arrangement under which an employee performs the duties and responsibilities of such employee's position, and other authorized activities, from an approved worksite other than the location from which the employee would otherwise work.

The County of San Mateo's Alternate Work Schedule Policies (2012) describes telework as follows:

> Telework allows employees to work at a site other than a County office or other County location. That site could be their home, a coffee shop or another location of the employee's choosing. Telework

> may be done occasionally or on a routine schedule, depending on the type of work done by the employee and the needs of the department.

In practice, "telework" is generally considered a voluntary work arrangement that allows employees to work at home, or other approved alternate worksite, during normal business hours.

Common Misconceptions

There are some very common misconceptions about telework that can prevent an organization from moving forward with implementing a program. These misconceptions are often part of the underlying cause of management resistance (the single biggest barrier to teleworking), so it's important to understand and address these issues in order to get management buy-in.

1. If I let one person telework, then all of my employees will want to do so.

Many people prefer coming to the office every day because they either like the social aspects of work, they do not think they would be disciplined enough to work from home, or they want to maintain clear boundaries between work and home. Studies have shown that only 30-40% of employees are interested in teleworking and believe that parts of their job are suitable for remote work.

Furthermore, the organization's telework policy should clearly state that telework is a management option, not a universal employee benefit or entitlement. The policy should also include clear eligibility criteria to determine which employees can participate. Many employees may decide teleworking is not for them based on these criteria. The eligibility criteria also give managers a basis for approving or denying an employee's request to telework and remove the appearance of favoritism.

2. Teleworkers are never in the office.

Teleworking on a full-time basis is still the exception rather than the norm. Most employees telework one or two days a week and report to the office the rest of the week. In addition, an organization's telework policy should include provisions requiring employees to come into the office on their scheduled telework day for required meetings or training.

3. I can't manage employees if I can't see them.

Some managers have never managed employees who work outside of the office so it is understandable that this may be uncomfortable for them at first. In practice, managing employees when they work at home should be no different than when they are in the office. Managers need to clearly communicate expectations and employees need to be accountable for results. The best way to overcome this lack of management skills is through training. In addition, there are many technology tools that can help to facilitate communication and define expectations such as instant messaging, WebEx, and Skype.

4. If employees aren't in the office, they're not working.

Teleworkers consistently report getting more work done at home than when in the office. This is mainly due to fewer interruptions and working during the time they would normally spend commuting. In addition, teleworking may enable employees to work at their "peak hours" (hours of the day when they are most productive), thereby extending service hours, if permitted by the organization.

5. Teleworkers are not available when you need them.

Teleworkers are typically available by telephone, email, and/or instant messaging when working from home. As a result, managers often report finding it easier to get in touch with teleworkers than staff in the office who may be away from their desks for any number of reasons. In addition, using the Work Planning and Communication Tool (see Section 9) fosters communication between the employee and supervisor about work-related expectations. As a result, supervisors often report knowing more about what their teleworkers are doing than employees in the office.

6. Employees who aren't allowed to telework will complain.

Not all positions are suited for teleworking and not all employees want to telework. However, what employees may complain about are appearances of favoritism when there are no clear policies or guidelines in place for determining which positions and employees are eligible to telework. Having a written telework policy that includes clear and objective eligibility requirements eliminates the perception that decisions are made arbitrarily or for personal reasons.

Informal versus Formal Telework Programs

Informal telework arrangements often originate as the result of an individual employee's circumstances. For example, a manager may suggest teleworking as a way to retain a highly-skilled employee who needs more flexibility to balance personal responsibilities. This type of informal arrangement is typically worked out between the individual employee and his or her manager without the benefit of a written telework policy, formal agreement, or training. Informal telework arrangements are beneficial from the standpoint that they demonstrate the value of teleworking to managers and the organization. However, while this may work on a small scale, it can become problematic

when other employees learn of the arrangement and are not afforded the same consideration.

By contrast, formal telework programs are much more structured and typically include written policies and procedures, a written agreement between the organization and the employee, and training for employees and managers. Oversight for the program is provided by the organization, most often the human resources department.

The key distinctions between informal and formal telework programs are summarized below. *(Table 2.1)*

Alternate Work Schedules at the County of San Mateo

Background

The County Manager's Office was responsible for managing the grant and convened an interdepartmental workgroup for feedback on how best to re-launch telework and flex-schedules. In preparation for the launch, the County created a unique code for its payroll system to allow telework hours to be tracked and worked with its payroll specialists to educate employees on how to use the

Table 2.1. Characteristics of Informal versus Formal Telework Programs

Characteristic	Informal	Formal
Program Oversight	• Minimal administration or oversight • Lack of uniformity in implementation across the organization • Lack of support to handle problems that may arise	• Internal ownership of the program • Consistent approach • Internal resources and assistance for addressing issues that may arise
Written Policy and Agreement	• No written guidelines or boundaries • Can lead to misunderstandings or abuse of the arrangement	• Sets clear expectations and requirements • Provides common understanding
Selection	• Subjective (based on the manager's discretion) • Decisions may appear arbitrary • Can lead to perceptions of favoritism or discrimination	• Objective (based on uniform eligibility criteria outlined in the telework policy) • Decisions are transparent • Equitable process for all employees
Training	• No guidance for employees or managers	• Provides managers and employees with the information, tools, and resources to be successful

code. No code was created for flex-schedules. Prior to the launch, the County conducted a baseline survey to measure employee participation rates in Alternate Work Schedules. The Human Resources Department (HR) worked to update its 1985 administrative memo on Alternate Work Schedule policies, outlining criteria all departments should meet when implementing Alternate Work Schedules and issues to consider when developing a department level telework policy.

Several departments and divisions re-launched their telework programs in the summer of 2012 to help inform the Countywide re-launch: the HR department, the Health Policy & Planning division, and the Engineering and Resource Protection division. While the HR department had a long history of telework, the Health Policy & Planning division conducted a telework pilot for the first time. The Engineering and Resource Protection division allowed telework on an occasional basis to complete specific projects. To evaluate the pilot's success and capture lessons learned, focus groups were conducted with teleworkers, non-teleworkers, and managers/supervisors in HR and Health Policy & Planning. The Aging and Adult Services division also conducted a telework pilot from April to July 2013, and went on to roll out a division-wide telework program.

In May 2013, the County re-launched its telework and flex-schedule programs. The County hired a telework training consultant, who met with department heads both one-on-one and in groups, conducted an organizational assessment, conducted focus groups, and piloted Alternate Work Schedule training for supervisors/managers in the County's Health System department. Throughout the summer, the County Manager's Office followed up and connected departments with the telework consultant for individualized support and resources. By October of 2013, the Health System had seen about 60 new teleworkers participating.

The County's overall approach on the re-launch was top-down outreach to the department heads and managers. Results from the County's annual Employee

Engagement survey illustrated that employees found value and appreciation in a flexible work environment. Working with the Employee Engagement Committee offered another way to reach out to departments and provide resources on Alternate Work Schedules.

Telework programs in other regions have used a bottom-up approach to launch telework programs. However, this approach often needs strong support and direction from executive and department leadership.

Baseline Survey Results

With assistance from an evaluation consultant, the County conducted a baseline survey in 2013 to measure current employees' participation in Alternate Work Schedules and telework. The County offered free $50 gift cards to five randomly selected survey participants. Approximately 1600 employees out of more than 5000 employees took the survey. Five percent of survey respondents stated they participated in the County's telework program and 35% stated they participated in the Alternate Work Schedules program. The majority of Alternate Work Schedule employees worked a 9/80 schedule (56%).

Many respondents (45%) stated that they were unaware of the County's telework program before taking the survey, indicating a need for greater communication about the program. Overall there was high interest in telework, with 68% being somewhat or very interested. Reasons for not participating in the telework program were varied: not being allowed to telework (31%), the need to be onsite in-person (24%), not being offered or available (20%), and not being suitable for their job description (13%).

60% of teleworkers had no suggested changes to the program, 20% wanted improved home access and technology capabilities, and 12% wanted the ability to work more telework days.

Of those using flex-schedules, 94% were somewhat or very satisfied with the program. Fewer respondents (25%) reported being unaware of the flex-schedule

program before taking the survey. Of those who do not currently use flex-schedules, 62% were somewhat or very interested in participating. There were a variety of reasons why employees do not participate in flex-schedules, including: not being offered or available (21%), not being allowed or permitted (18%), not being suitable for their job description (15%), their personal preference or schedule (11%), and being a new hire that is not yet eligible (10%).

Of those participating in the flex-schedules program, 15% wanted to be able to work a 4/10 schedule and 12% suggested greater flexibility of flex days would improve the program.

Topline Survey Results

The County conducted a follow-up, topline survey in October 2014 to evaluate changes in employees' participation in Alternate Work Schedules and telework. Again, the County offered free $50 gift cards to five randomly selected survey participants. Approximately 1800 County out of more than 5000 employees took the survey. Four percent of survey respondents stated that they participate in the County's telework program and 36% stated that they participate in the County's AWS Program.

The percent of respondents who stated they were unaware of the telework program prior to taking the survey (44%) was similar to that in the baseline survey. There continued to be a high interest in telework with 70% of respondents reporting being somewhat or very interested in occasionally working from home.

The survey asked respondents why they do not currently participate in the telework program. Verbatim responses were recording and later grouped into categories. The reasons why employees do not participate in telework include: not allowed/permitted (29%), not suitable for job description (25%), not available/offered (21%), and need to be on-site or in-person (11%). Others stated reasons include being a new hire, not having the proper technology at home, and uncertainty over whether they are qualified. Based on these results, methods to increase telework

participation in the County could include increased outreach about the program and resources for supervisors to assess employee participation.

Of those respondents who currently telework, 89% stated that they are very or somewhat satisfied with the telework program. The survey asked respondents what improvements could be made to the telework program. Responses were recorded verbatim and later grouped into categories. Suggested improvements include: improve home access/technology capabilities (25%), more telework days (13%), open to employees of all levels/in all departments (7%), and more encouragement/acceptance. 46% of respondents had no changes to suggest to the telework program.

75% of respondents stated that they were aware of the AWS Program before taking the survey. Of those who currently participate in the AWS Program, 95% of survey respondents reported being very or somewhat satisfied. The survey asked respondents what changes could be made to the AWS Program to best improve it; responses were recorded verbatim and later grouped into categories. A majority (61%) of respondents reported no changes were needed. Suggested changes that were recorded include: offer 4/10 schedule (14%), flexibility of flex days (14%), open to employees of all levels (3%), and allow earlier start times/later end times (3%). While many employees are aware of the County's AWS Program, changes could be made to it to make it more accessible and beneficial to all County employees.

Lessons Learned

Managers are more willing to consider flex-schedules than telework. Many managers already allow employees to work 9/80 or 4/10 flex-schedules. These schedules allow managers to continue to rely on measuring productivity and performance through a line of sight approach. When employees are out of their office, they are on scheduled off days and do not work. However, managers continue to be uncomfortable with telework, with many concerned about not being able to know if workers will be productive from home. One of the biggest concerns voiced by managers is the question of how to supervise employees that telework. Overall, many managers are not yet comfortable with managing to results instead of managing by line of sight. A premise behind the County's grant proposal was that free training of employees and managers and individualized support from a telework consultant would be sufficient to address and overcome managerial concerns and resistance to telework. However, establishing trust between managers and employees is not something that can be easily addressed through telework training. Absent a push from executive or department level leaders, some level of trust between managers and employees needs to exist in order for managers to consider telework in the first place.

Where strong executive or managerial support and trust exist, we found telework can thrive. The Health System's leadership embraced telework and has seen a large increase in telework participation as a result. In the Aging and Adult Services division, telework has been a win-win-win for managers, employees, and the environment. Staff satisfaction and morale have increased. At the same time, there has been no negative impact to productivity and overall better communication between employees and managers. Following successful pilot programs, divisions in the Health System have increased telework participation and are taking the next steps to explore maximizing the financial potential of telework through hoteling and office space redesigns. Between March 2013 and October 2013, more than 60 Health System employees began teleworking.

Telework programs are often described as low-hanging fruit because they have low financial costs for implementation; however, they can require a high degree of organizational culture change, which can make them hard to implement. Overall, implementing flex-schedules may be an easier way to decrease employee vehicle miles travelled and associated greenhouse gas emissions due to a greater level of acceptance by managers. Where there is managerial or executive resistance to telework, there may still be an opportunity to maximize the use of flex-schedules. Where there is strong managerial or executive support of telework, telework can flourish.

Alternate Work Schedule Policies

The County has a policy on Alternate Work Schedules dated June 17, 2013.

Countywide Policy

San Mateo County Departments may develop and implement alternative work schedule policies for their staff. The terms of the policies may vary by Department, but all policies must consider the Countywide performance criteria. Details and resource recommendations on schedule options, the Countywide performance criteria and policy issues are detailed below.

Alternative Work Schedule Options

San Mateo County Departments may develop alternative work schedule policies for any or all of the following schedule options:

- **Flexible Hours** Staff on flexible schedules work an eight hour a day, five day week, but may start earlier than 8:00 am or work later than 5:00 pm. Flexible schedules can include start and end times that vary daily, but once a schedule is set, the daily schedule cannot change without the permission of the supervisor.

- **Alternate Work Weeks** Employees on alternate work weeks work 40 hour weeks in four days or 80 hours

in nine days. These schedules are called 4/10 and 9/80 schedules and are described below.

» **9/80 Schedule** – On a 9/80 schedule, an employee works 80 hours in nine, rather than ten, working days per pay period. The employee works eight 9 hour days, and one 8 hour day each pay period and has one day off every two weeks. The eight-hour day and the off day must fall on the same day of the week (e.g. off first Wednesday and 8 hour day second Wednesday). The Fair Labor Standard Act (FLSA) requires that employees working a 9/80 schedule must sign a declaration defining the work schedule. The schedule may not be modified without incurring overtime expenses. Off days cannot be changed to accommodate coverage or other needs and all 9/80 schedules must be entered into the Automated Time Keeping System (ATKS).

» **4/10 Schedule** – Employees on 4/10 schedules work eight 10 hour days per two week pay period with two days off. To prevent the payment of overtime due, no more than forty hours can be worked in any one week. Prior to discussing 4/10 schedules with staff, contact Employee Relations. As a note, the overtime after 8-hours law does not apply to the public sector.

• **Voluntary Time Off** Voluntary Time Off (VTO) is a countywide program that allows employees to reduce their work hours by 1%, 2%, 3%, 4%, 5%, 10% 15%, or 20%. Requests are submitted to Supervisors and Department Heads for approval. The hourly salary rate for employees with approved VTO requests is reduced by the percentage of VTO approved. For example, an employee with 5% VTO would have their salary reduced by 5% from the date of approval through the end of the fiscal year. Prior approval is required before staff can take off VTO hours. With Department approval, VTO time may be used in hourly, day or block increments.

• **Telework** Telework allows employees to work at a site other than a County office or other County location. That site could be their home, a coffee shop or another location of the employee's choosing. Telework may be done occasionally or on a routine schedule, depending on the type of work done by the employee and the needs of the department.

Countywide Alternate Work Schedule Criteria

All Department alternate work schedule policies should meet the following countywide criteria:

• Improve or maintain Department service delivery

- Improve or at a minimum maintain client service and staff availability to the public

- Be cost neutral – i.e. no backfilling of positions required, no increase in overtime or holiday pay

- Have no negative impact on other County departments, functions or staff

- Improve or maintain employee productivity

- Contribute to hiring and retention of productive and engaged staff

Departments should use the criteria above to establish baseline and ongoing performance measures against which they can track the success of their alternative work schedule policies.

Issues to Consider in Developing a Telework Policy

Departments developing alternative work schedule policies or considering revising existing policies should work the Human Resources Department if they have questions or concerns. Human Resources must always be provided a copy of the Departments policies. In the development or review of these policies, Departments are strongly encouraged to address the following issues:

- **Eligibility** Not all positions are good candidates for alternate schedules, nor are all employees automatically eligible. Departments need to consider the types of jobs that are eligible along with specific individual requirements, including performance and attendance history. Employees that have less than competent reviews, have not passed their probationary period, are in training and/or need close supervision will usually not be eligible for alternate schedules

- **Designation of Core Days and Business Hours.** To minimize the impact on office scheduling, departments that implement flexible schedules are encouraged to establish "core" day(s) of the week, when all staff are expected to work on-site. Core days may not be an "off-site day" under an alternative work program. Departments are also encouraged to establish "core" hours of the day,

when staff working that day are expected to be in the office. Core hours may not be "out-time" under a flexible schedule.

- **Supervisor Training** Departments that implement an alternative work policy should encourage supervisors and managers to participate in Human Resources' trainings on managing staff on alternative schedules. Training topics include: assessing employee eligibility, managing a mobile workforce, tools for supporting employees working an alternative work schedule, defining performance targets, and measuring the impact of alternate schedules on individual and team performance.

- **Evaluation of Alternative Schedules** Alternate work policies should include both individual and department-wide evaluations to ensure that the Countywide criteria are and continue to be met. The length of the review period is up to the Department, but for pilot programs, six months is suggested and annual reviews are recommended for on-going programs. For individuals, if at any point during the contract period, any aspect of performance is compromised by the alternative schedule, the supervisor should meet with the individual to discuss the problem. If the problem cannot be resolved, the schedule should be changed.

Resources

Many San Mateo County Departments have developed and implemented successful alternative schedule policies that can be used as templates by other departments. Human Resources is compiling a reference file of these policies and also has policies and best practices developed by other public agencies and the private sector. Human Resources is also putting together a training to help supervisors and manager's be successful in implementing alternative work schedules. Departments interested in developing a policy are encouraged to start by reviewing the files of existing policies and speaking with Human Resources and other Departments that have successfully implemented programs.

3. The Benefits of Telework

Teleworking has many well-documented benefits for organizations, employees, and the environment. It is an effective business tool, provides greater flexibility and lower stress for employees, and helps to improve our environment by reducing traffic congestion and air pollution. The advantages of teleworking make it a win-win-win situation for all concerned.

Organizational Benefits

Telework is an effective business management strategy which, if structured properly, can have many positive benefits on:

- Recruitment and Retention
- Absenteeism
- Productivity
- Business Continuity
- Real Estate Costs
- Customer Service

Recruitment and Retention

Hiring new employees is costly and time consuming. Employee turnover affects organizations in terms of the direct financial costs of replacing the employee as well as the intangible costs resulting from a loss of productivity and institutional knowledge. According to a report by the Society for Human Resource Management, the total costs of replacement, including training and loss of productivity, can range from 90% to 200% of an employee's annual salary. Furthermore, a 2012 report by WorldatWork, showed that work-life balance issues were one of the main reasons key employees chose to leave their organizations.

Offering flexible work arrangements is a cost-effective way to attract and retain good employees. Numerous studies have shown a correlation between telework and job satisfaction. Some of the most common reasons include reduced stress from commuting, better work-life balance, more autonomy, reduced transportation costs, and fewer work place distractions. Organizations

that provide telework and other alternative work schedules tend to have a competitive advantage over organizations that do not. Employees are seeking better work/life balance, and this is especially true of Millennials (also referred to as Generation Y)—those in their 30's and younger who have grown up in a world of rapidly developing technology. According to research reviewed by Global Workplace Analytics, Millennials are more difficult to recruit (as reported by 56% of hiring managers) and to retain (as reported by 64% of hiring managers), but they are particularly attracted to flexible work arrangements. Teleworking is also a good option for single parents who need greater flexibility to balance work and family demand; however, teleworking should not be viewed as a substitute for child care arrangements, especially in the case of infants and very young children.

Telework has also been used to retain skilled employees nearing retirement but who are willing to continue working under a flexible work arrangement and employees forced to relocate due to a spouse's job transfer. Teleworking may also be suitable for contractors, consultants, and agile workers who may not have access to dedicated space at the organization's worksite. In addition, some organizations have been able to expand their geographic reach by hiring full-time teleworkers who live in other parts of the country, without requiring them to relocate.

Absenteeism

Absenteeism costs U.S. employers billions of dollars annually in lost productivity. Studies have shown that nearly 80% of employees who call in sick are really not ill; rather, they stay home due to family issues, personal matters, and stress. Teleworking has been proven to help reduce some of some of the most common causes of absenteeism including:

- **Personal Matters** – Teleworking allows employees the flexibility to take care of routine personal matters, such as waiting for a repairman or on a delivery, and still have a productive day of work from home.

- **Medical Issue*s*** – Employees who are sick may not feel up to coming into the office, but they may be able to get some work done from home. In addition, keeping sick employees home reduces the chance that they will make everyone else in the office sick. Teleworking can also be used to keep employees productive, even if on a part-time basis, when recovering from an injury or during pregnancy.

- **Stress** – Teleworkers consistently report feeling less stress from commuting and the distractions inherent in the office environment.

The federal government's telework cost/benefit model shows a 63% reduction in unscheduled absences per teleworker, which is consistent with the results reported by the American Management Association.

Productivity

Very few organizations actually measure "productivity" of employees in the office so it is difficult to quantify the actual gain in productivity when working remotely. That said, teleworkers consistently report getting more work done when working at home for two main reasons:

- **Fewer Interruptions** – Teleworkers are able to replace the typical day-to-day office distractions with hours of uninterrupted time (solitude) when working from home. This enables the employee to focus directly on the tasks at hand and to produce more work in less time. This aspect of increased

productivity is based on several caveats. First, teleworkers must be organized and be able to focus on what they are going to accomplish for the day. Second, the employee's home office environment needs to be relatively free of other potential household distraction, such as young children or another household member working from home or running a business. Third, the employee needs to have the right equipment and connectivity to be productive. Sluggish connections or repeated dropped connections can really slow down an employee's productivity. The good news is that these factors can be easily addressed through a formal telework program that includes a written policy, training, and sufficient remote access infrastructure.

- **Working Longer Hours** – Teleworkers often report working during the time they would have been commuting and/or after normal business hours. Some employees are motivated by the sense of accomplishment that comes from getting their work done, while others may feel the need to demonstrate that they can be trusted to work at home by working more. "Overworking" can be a problem for some employees, especially if they have "workaholic" tendencies to begin with, because the work is always at hand. Consistently putting in long hours can lead to employee burnout and disengagement. The need to have clear and distinct boundaries between "work" and "home" is one of the reasons some employees choose not to telework.

Lastly, in organizations where employees have the ability to set their own work hours, they are more likely to be able to work during their "peak hours," when they are most productive. For some, this may mean starting their work day very early; while for others, it may mean working late at night.

Business Continuity

Disruptive events are common-place in today's society. They range from accidents that can snarl traffic for hours, transit strikes that can last for several days or longer (such as the BART strike in 2013), and major transportation construction projects that can last for years.

Loma Prieta Earthquake – San Francisco, 1989

One of the earliest examples of the use of telework in an emergency situation took place in California in 1989. In mid-October, the Loma Prieta earthquake severely damaged the U.S. Environmental Protection Agency (EPA) Region 9 office building in San Francisco, displacing nearly 800 employees. EPA responded by establishing an auxiliary command post for 80 employees and work-at-home arrangements for the remaining 700+ workers. By March 1990, 60% of the displaced employees were back in traditional (temporary) workstations with the other 40% continued teleworking while awaiting the opening of a new office building. EPA conducted several studies of this experience, learned quite a bit about the feasibility and utility of telework as both a general workplace strategy as well as an emergency response strategy, and continues to use telework more than two decades later.

Telework is an efficient and effective way for organizations to enable their employees to remain productive in response to these types of events. As long as power is not interrupted, business can generally go on as usual. Some organizations require all of their employees to be "telework ready" whether they chose to telework on a regular basis or not. Having essential personnel and other key staff trained and prepared to telework in case of a disruptive event places an organization in a much better position to continue vital work.

A benchmarking study conducted by the Telework Coalition demonstrated how one organization used telework as part of its continuity of operations plan in the wake of Hurricane Katrina, which displaced more than 500 of the company's employees. The employees evacuated on Sunday and many were literally back to work on Monday, working remotely from the locations they had dispersed to.

Real Estate Costs

Office space is typically an organization's second largest cost, with personnel costs being number one. Not only are traditional offices expensive, but they are also inefficient. Research across industries has shown that workstations are unoccupied 60% of the time and private offices are unoccupied 77% of the time.

Telework has the potential to significantly reduce an organization's real estate costs. However, the organization must have a "critical mass" of employees who telework frequently, either full-time or several days per week, to reduce their office space needs. This practice is still the exception rather than the norm, but the cost savings can be substantial for those organizations with work that can be done remotely and whose culture is supportive of teleworking.

"Hoteling" is often used to meet the needs of those employees who telework several days a week, but still need to be in the main office on a regular basis. Under this type arrangement, dedicated office or workstations for teleworkers are replaced with shared workstations, which the employees reserve in advance on the days they plan to be in the office. The hoteling workstations can also be used by full-time teleworkers who may need to report to the office occasionally (monthly or quarterly).

According to research gathered by Global Workplace Analytics, the average annual real estate savings with full-time telework is $10,000 per employee. In addition to real estate cost savings, some organizations may also be able to reduce other overhead expenses such as utility and parking costs. For organizations that embrace telework and mobility as a way of doing business, the cost savings can be huge:

- Unisys reduced its real estate footprint by 90% for an office in Northern Virginia by implementing a full-time telework program for 120 employees, resulting in savings of more than $1 million annually.

- Sun Microsystems, headquartered in California, reported saving $68 million a year in real estate costs and $3 million a year in reduced power consumption by providing flexible work options for 17,000 employees (2,000 primarily working at home and an additional 15,000 teleworking up to 2 days a week).

Customer Service

Teleworking can have a positive impact on customer service in situations where interaction with customers and the public occurs predominantly by phone or email. This is because employees may be more accessible and available when teleworking (compared to when they are in the office). Customer service hours may also be extended, especially if teleworking is used in combination with other alternate work schedules. Customer service should remain seamless regardless of where employees are working. A best practice would be to survey customers before and after implementing a telework program to determine if there is any change in customer satisfaction.

In situations where customer service is provided face-to-face and this interaction cannot be replace by other means, then teleworking is probably not a good fit.

Return on Investment

Measuring the Return on Investment (ROI) requires the ability to collect and analyze the costs and benefits associated with an organization's telework program. Some organizations may find that a detailed analysis is not necessary; while others may find it is necessary to gain management buy-in and support. Establishing the organization's strategic goals for teleworking at the outset is an important part of the process because it defines how the program will be developed and implemented. Making sure that the goals are in alignment with what is being measured will help the organization determine its ROI.

Table 3.1 below includes illustrative examples of the types of costs and benefits that an organization may want to factor into its telework ROI calculations.

Calculating ROI can be a complex process but there are several online tools that make the process of easier.

The **Mobile Work Exchange**—a public-private partnership focused on demonstrating the value of telework and mobile work—released a Telework Return on Investment (RoI) Toolkit in 2014. The toolkit includes a complimentary **Telework RoI Calculator** and a best practices report. While geared towards the

Table 3.1. Illustrative Examples of Telework Costs and Benefits

Costs	Benefits
• Staff time and/or consultants • Technology (e.g., laptops/docking stations, tablets, smartphones, collaboration tools, virtual private network, security, etc.) • Recurring costs (Internet and cell phone reimbursements, if applicable) • Training • Marketing	• Recruitment/Retention • Productivity • Absenteeism • Business Continuity • Real Estate • Utilities

federal government, the RoI toolkit contains factors that are relevant for state and local governments, nonprofits, and the private sector.

The calculator enables organizations to estimate ROI for the most commonly identified telework and mobility value factors:

- Employee retention
- Productivity
- Continuity of operations
- Environmental impact
- Real estate/utilities

The calculator draws from industry standard information, such as the average cost per workstation for a federal employee, to calculate savings for each value factor. The calculator can be used to calculate ROI for actual or hypothetical scenarios.

The best practices report, "Measuring Telework and Mobility Return on Investment: A Snapshot of Agency Best Practices" looks at different ways agencies evaluate the success of their telework programs to demonstrate how the program is helping the agency meet its core missions at a reduced cost. Again, the approaches used can be adapted for use by other governmental agencies, as well as the private sector and nonprofits.

Global Workplace Analytics, based in California, has developed several models that can be used to quantify the economic, environmental, and societal benefits of teleworking and other flexible workplace strategies. Their models – which are based on extensive research of more than 4,000 workplace flexibility studies, reports, and case studies – have been used by organizational and community leaders in the U.S, U.K , and Canada to quantify the benefits of flexible work arrangements. Global Workplace Analytics offers several free and fee-based **Workplace Savings Calculators™** that quantify the benefits of emerging workplace strategies for communities, companies, and individuals.

Environmental Benefits

Teleworking is an effective strategy for reducing commute trips and vehicle miles travelled (VMT) and has been used in many regions throughout the country to help mitigate traffic congestion and air quality issues. A study by the Climate Group for the Global e-Sustainability Initiative found that teleworking was at the top of the list of the many ways the tech industry can reduce emissions.

Teleworking and other alternative work schedules help take cars off the roads during peak commute times, reduce tailpipe emissions that contribute to smog and greenhouse gases, and reduce fuel and oil consumption. In a study conducted by the State of Washington, the average teleworker saved nearly 28 pounds of carbon dioxide for each day that they teleworked.

Employee Benefits

Employees who telework benefit in a number of ways including better work/life balance, reduced stress from commuting and office distractions, a greater sense of autonomy and control over their work, and reduced commuting expenses. Overall, telework increases job satisfaction and morale. Even employees who telework once a week (or less) can benefit from teleworking.

A Telework Pilot Project conducted in the State of Washington showed that schedule flexibility was rated higher than any other benefit by participants. The study found that teleworking gave employees greater flexibility to schedule doctor visits, parent-teacher days, and other important non-work tasks. It also provided employees with more opportunity to spend time with family and friends or attend events in the community.

Telework Barriers

Despite the many benefits that telework has to offer, there can be barriers to implementation. For some organizations, having employees work outside the traditional office is quite common. However, for others,

Hoteling Best Practices Case Study

Company Overview:

AgilQuest creates software and service solutions that support today's mobile workforce and eliminate wasted office space. The AgilQuest system was used by the U.S. General Services Administration when they consolidated four buildings leases into one and went from 4,500 desks to 2,000 using telework/hoteling, saving $25-$30 million annually. The AquilQuest system also interfaces with GSA's smart building technology to control lighting and heating when space is not occupied.

Best Practices:

- Determine utilization by conducting "bed checks" (walk around 10AM and 2PM every day for a week or two to see how many desks are actually in use).

- Put everyone and all desks on the system. Those workers who are permanently assigned have access to their desk any time they are in the office. On the occasion they are out of the office (vacation, sick, travel, teleworking, etc.) their desk becomes automatically available, for that day, to be used by hoteling workers.

- Designate certain other desks for hoteling to be booked daily. Hoteling workers can use either the desks set aside for hoteling, or the empty "permanently assigned" desks that are vacant because their inhabitants are not there. On average, this will happen quite often (as much as 50% of the time).

Resources:

- **GSA Workspace Utilization and Allocation Benchmark (July 2011, updated July 2012)**

  Excellent report on findings of workspace use practices and trends based on GSA's research and contact with professional trade organizations, private sector firms, and Federal agencies, as well as national, international, state, and local governments. Includes three case studies and 10 workplace benchmarks.

  http://www.gsa.gov/graphics/ogp/Workspace_Utilization_Banchmark_July_2012.pdf

- **Measuring Actual Use of Space (not dated)**

  AgilQuest white paper on measuring use of space, including real life examples.

  http://agilquest.com/Whitepapers-Reference-Guides-and-Checklists/measuring-actual-use-of-space.html

  (Many other white papers and webinars available on the AgilQuest website.)

- **10 Strategies to Maximize Workspace (not dated)**

  White paper from Asure Software on maximizing workspace.

  http://www.asuresoftware.com/media/112160/asuresoftware_10_strategies_to_maximize_workspace_utilization-1-.pdf

- **Successful Hoteling: GSA's 10 Tips (not dated)**

  Federal best practices on implementing successful hoteling programs.

  http://www.gsa.gov/graphics/admin/Successful-Hoteling-Tips_Final.pdf

this is a totally new way of doing business. Studies have repeatedly shown that management resistance is still the single biggest barrier to telework. The underlying causes for this resistance are fears based on misconceptions about teleworking, lack of trust that employees will remain productive when working at home, and lack of skills for managing remote workers. All of these factors can be addressed by establishing a formal telework program that includes written policies and procedures and training to engage leadership, management, and employees. Other methods for overcoming management resistance include:

- Linking telework with the organization's strategic goals.

- Encouraging or requiring managers to telework (at least from a business continuity perspective).

- Expanding internal communication/marketing.

- Sharing best practices.

Other commonly reported barriers such as information technology, budget constraints, and security are inter-related. Equipping teleworkers with the right technology and providing secure remote access are necessary steps in the implementation process and should be incorporated into the organization's technology budgeting process.

Maintaining adequate office coverage can also be a barrier for telework and other alternative work schedules, especially for smaller organizations. This can be addressed through a policy that clearly puts the organization's business needs first and defines hours of coverage and staffing levels required. The policy is then reinforced through the approval process (based on eligibility criteria), training, and scheduling.

Last but not least, other internal priorities may get in the way of an organization's good intentions to implement a telework program. It is important that the organization allocate the necessary resources to develop the program (staff and/or consultants), establish an agreed-upon implementation schedule, and hold those involved accountable for producing results. Otherwise, the initiative may face delays or never get off the ground

4. County of San Mateo Case Studies

Health Policy & Planning Division

Background

The Health System is the largest department in San Mateo County and released a department-wide revised Telework Policy and technical assistance guide in the summer of 2012. In July of 2012, Health Policy & Planning (HPP), a division of the Health System, initiated a telework pilot program. HPP includes Epidemiology, Communications, and Policy and Planning staff. Telework is one strategy being utilized to help address limited parking at the HPP worksite, increase employee engagement, and attract a regional talent pool.

Telework Pilot

HPP began a six month telework pilot program in July of 2012. Half of the division's 16 staff members participated in the pilot. HPP leadership created a broad telework policy that could be adapted and used by other divisions. The policy and a written telework agreement also served to make the eligibility and enrollment process transparent for all staff. The policy was discussed and modified at staff and leadership meetings. The final policy was shared with all staff via email and discussed further at all staff meetings.

Staff performing policy, planning, communications, and epidemiology functions were eligible to participate in telework. They could telework up to two full days per week, and could combine telework with a 9/80 or other Alternate Work Schedule. In order to facilitate scheduling in-person meetings, the division designated Tuesday as a core office day when no one could telework. Staff were eligible to telework any of the other days of the week. Staff were required to note their telework days and include an appropriate phone number on an open GroupWise calendar. This ensured

that the lines of communication remained open during telework days.

Health System Administration created additional materials focused on the needs of its staff, including a number of telework "cheat sheets" that were also shared across the entire Health System Department: How to forward a County phone to an outside phone, how to map shared drives through VPN, how to block a phone number from appearing on caller ID (for staff using personal cell phones when teleworking), an ergonomic check list, mileage calculator showing examples of how to claim mileage for meetings attended from a telework location, telework approval and monitoring tips for supervisors, telework agreement for supervisors and employees, and the Health System Telework Policy and FAQs. See Section 9 for example cheat sheets.

Program Outcomes

In January 2013, at the end of the pilot, the telework program was considered successful and expanded to an ongoing program in HPP. As part of the pilot's evaluation,

HPP staff conducted two focus groups to identify the program's strengths and areas for improvement. Focus groups were conducted with both staff that teleworked and staff that did not telework. All staff were supportive of the ability of their peers to participate, regardless of whether they were personally eligible to telework. Staff highlighted the following beneficial outcomes from the pilot program:

- **Increase in Quality of Projects**
  - » Fewer distractions, allows more focus on bigger projects

» Change of venue allows for more creativity

» Projects move along faster due to uninterrupted time

• **Supporting Green Initiatives**

» Less commuting and use of car

» Can attend out-of-County meetings with a smaller carbon footprint

» Contributing to the County's greenhouse gas emission reduction goals

• **Personal Benefits**

» Save money on daycare (do not need to pay for extra time due to transit)

» Less stress (not rushing to/from work)

» More time to do other things (e.g. exercise vs. commuting)

» Allows staff to live further away from work (e.g. "more home" or home ownership opportunities because of lower cost of living)

» Flexibility and support makes staff want to go above and beyond (e.g. do not mind putting in extra hours to get the job done because accommodations have been made for them)

Lessons Learned

Based on the focus groups and experience implementing the pilot program, HPP identified recommended areas to address and focus on for those interested in initiating a successful pilot telework program. These areas included:

• **Increase Communication Among Employees**

» Ensure that teleworkers return messages in a timely manner.

» Ensure all staff know teleworkers' schedules ahead of time.

» Notify coworkers ahead of time when changing telework days.

• **Utilize Technology**

» Videoconferencing, instant messenger or chat, and cell phones help communication.

» Maintain a pool of cell phones for check-out or have a reimbursement strategy for employees to use personal cell phones.

» Check technological feasibility of viewing proxy calendars (details on calendar/availability) when working from home.

• **Plan Ahead**

» Set expectations for due dates to avoid emergencies arising from a mix of staff schedules.

» Consider impacts to project timelines.

» Set group meetings in locations that are convenient for both teleworks and non-teleworkers.

» Hold all staff members accountable to deadlines.

• **Share Protocols on How to Start Telework**

» Tell employees the steps to set up telework.

» Know what technology is required (VPN, how to access drives, etc.).

- **Establish Protocols in Expectations and Flexibility of Telework Days**

  » Emphasize telework is a privilege and there may be times when staff must attend meetings in-person on scheduled telework days or forego telework days due to holidays, vacations, or staffing needs.

  » Set expectations or have protocols about attending meetings in-person or via conference call/ videoconferencing.

- **Minimize Impacts to Team Dynamic**

  » Set Core Days when everyone is in the office and be prepared for these days to be more hectic due to urgent needs.

  » Encourage face-to-face time on Core Days.

  » Develop ways to "connect" with new employees when teleworking.

  » Ensure non-telework staff do not have to take on telework staff's duties in their physical absence

  » Develop ways to keep teams updated on what work is on each person's plate to prevent "dumping" work onto others.

  » Plan project timelines to help prevent delays. The combination of a telework day with VTO, a holiday, or a vacation can impact timelines.

  » Setting up meetings between teleworkers and non-teleworkers can require more steps.

  » Develop a way to approve or sign documents electronically. The need for immediate signatures could result in calling staff back into the office.

  » Be flexible and try new things if traditional meetings no longer work.

- **Ensure Equity / Incentive for Non-Teleworking Staff**

  » While telework is a privilege, there are also benefits associated with it. Consider ways to create a positive culture and ensure fairness for those who cannot telework.

- **Develop a policy around if, when, and how interns can telework.**

Technology

HPP staff utilize technology to maintain communication while teleworking. During the pilot, HPP had begun the process of replacing desktop computers with laptops and docking stations. The division now has eight laptop work stations which can also be used at home while teleworking. The computers were replaced at a minimal cost. While teleworking, staff communicate via email (GroupWise) or phone.

Aging and Adult Services Division

Background

Aging and Adult Services is a division of the San Mateo County Health System, the largest department in San Mateo County. While Aging and Adult Services had a telecommute option available, several factors prompted the division to re-launch the telework program. For example, limited parking at the health campus and the office remodel provided momentum to refresh the telework program. In addition, the Health System Department head strongly supports sustainable initiatives.

Telework Pilot

The Aging and Adult Services Director wanted to move away from the County's original rigid telecommute policy toward a more flexible model re-branded as telework. Under the original policy, staff were required to sign up with what work they would accomplish on a specific telecommute day and return to the office with all work completed. Employees could telecommute only one day per week or one day every other week when on a 9/80 schedule. The division had Tuesdays and Thursdays as their core days when all employees were in the office. Community meetings at the health campus were often also held on Tuesdays through Thursdays. The combination of core days and community meetings compounded to make limited parking even more difficult. In addition, the rigid schedule often made employees unavailable for unscheduled meetings that occurred on their telecommute day.

In April 2013, Aging and Adult Services' offices were remodeled, displacing more than 60 staff members. While 60 staff moved to the County's Redwood City campus, one unit made up of a supervisor and four employees began regularly teleworking. Some hoteling spaces were made available as well. Aging and Adult Services used this temporary move as an opportunity to pilot telework for 6-8 weeks.

By July, 2013, Aging and Adult Services had seen many benefits from the pilot, including better communication and good workflow, and moved ahead with creating a telework policy for the division.

A number of changes were made to re-launch the new telework model. The division eliminated core days and fixed telework days. Instead, eligible staff may telework as needed without having to schedule their days ahead of time and immediately report back on work completed. To help with scheduling meetings, division leadership set the expectation that anytime an in-person meeting is scheduled, teleworkers will re-arrange their time to accommodate it and attend in-person. Accountability is based on productivity and responsiveness, and staff have the same job responsibilities. Teleworkers are required to continue to respond to email, return phone messages within two hours, and come in for emergencies. Individual units can add additional requirements to these basic expectations.

To re-launch the program, every eligible employee had to re-apply to the telework program and receive approval from their supervisor, manager, and the division director. This application process for approval helped set the expectation that telework was a privilege and not a right. Not all employees were eligible for telework based on their job responsibilities. For example, staff that needed to be present in person to carry out their job, such as a receptionist greeting visitors, were determined to be ineligible for telework. Positions currently eligible to telework include most Social Workers, Deputy Public Guardians, Public Health Nurses, and Community Program Analysts. These positions tend to be direct service staff that work in the field. Some eligible employees chose not to telework.

In addition, the division Director did not generally allow supervisors to telework during the first year of telework implementation. Due to the nature of their work,

the Aging and Adult Services division often handles crisis situations, and it is important for managers to be physically present. Managers telework on a very limited, sporadic basis. With nearly one year of telework experience gained, supervisors will begin to be allowed to telework going forward.

Overall, 46 staff (74 percent of eligible staff) are now teleworking an estimated 50 percent of all their hours. Many of the eligible staff positions are line staff, such as social workers. The new telework model allows for greater mobility, flexibility, and use of time. Rather than coming into the office first, and then going out to meet a client, social workers can now go directly from their home to meet their client and return directly home at the end of the day.

The Aging and Adult Services Director conducted regular monthly check-ins with her leadership team following the re-launch of the telework program. These meetings helped address manager concerns and initial implementation challenges, such as how supervisors could best monitor staff to ensure all work was completed. No additional training accompanied the re-launch.

Technology

Initially there were some technological challenges to implementing telework. The ability to connect remotely using the County's VPN was at times a problem, as was the short battery life (less than one hour) of older laptops. Social workers conducting in home visits with the elderly were not always able to sit near a plug. The division now has new laptops that have helped address this issue. WiFi access can be an issue due to concerns about confidential client information, and staff are not permitted to use public WiFi. Teleworkers in the field will use our VPN Cisco AnyConnect secured connection to County/Aging and Adult Services resources. Videoconferencing and Yammer or chat have not yet been needed or used for communication by line staff that telework.

Lessons Learned

With the re-launch of telework, the following lessons learned have been noted:

- **Culture change** The division's new telework model has involved culture change around what is the new way of doing business. For example, there was a cultural norm that using a laptop in front of a client was intrusive. With newer social workers accustomed to using technology and the push to telework, there has been a shift towards now using laptops in front of clients. Social workers are seeing how using a laptop to conduct client interviews can be helpful.

- **Performance and evaluation** Supervisors initially struggled with the question of how to effectively monitor that work was being completed. Now that telework has been implemented for almost one year, most supervisory staff are reporting that they feel more in touch with staff now than before telework. Staff feel more compelled to touch base frequently with their supervisors and keep them in the loop about upcoming client visits when they telework. Supervisors have set performance measures and standards, which they use to create staff accountability. For example, In-Home Supportive Services staff productivity is measured by the number of on-time vs. overdue reassessments of clients. Public Guardians and Centralized Intake track the timely responsiveness of staff to emails and voicemails. Some, but not all, supervisors have seen an increase in productivity. Productivity is seen as an issue that can come up regardless of one's telework status. Productivity issues are dealt with on a case by case basis.

- **Personal Benefits** Teleworkers report feeling less stress due to not having to deal with traffic, having greater flexibility, and better work/life balance.

- **Parking Remains a Challenge** Parking at the health campus has not necessarily improved now that some staff are teleworking. A much higher participation rate in telework would likely be needed to improve parking.

Human Resources Department

Background

The Department of Human Resources (HR) is an example of ongoing, routine telework. The option to telework emerged as a cost savings effort during an energy crisis over five years ago. The Human Resource Department responded by instituting a flexible work schedule, which provided many alternative work options for employees including a 4/10 work-week or telework on Fridays. After the energy crisis ended, the Human Resources Department, realizing the numerous benefits of flexible work schedule, continued to informally support the flexible work model.

Telework Pilot Re-Launch

HR initiated a re-launch of the telework program for the entire department in June 2012. Staff worked with their manager to determine if a telework schedule would work in their division and position. The department made every effort to accommodate employees who requested a telework schedule. If telework was a good fit, the employee and manager

worked with IT staff to ensure teleworkers had the appropriate equipment to work from home or from another site.

The department has 68 employees, with 21 employees teleworking. There are a variety of positions that are well suited for telework, ranging from senior management to interns. A total of 10 position types are represented by teleworkers including: Executive Secretary, Management Analyst, Human Resource Manager, Human Resource Technician, Program Coordinator, Financial Services Manager, Worker's Compensation Coordinator, Senior Graphics Specialist, Administrative Assistant, and Office Specialist. Many of the staff who telework do so one day per week, on Fridays; however, staff may adjust their schedule to meet the workload demands and organizational needs.

Technology

HR spent about $2000 to purchase extra laptops. Some were assigned to specific staff, while others were added to a pool of available equipment. With advances in technology and remote access software, new staff who begin to telework are able to use their own equipment; saving valuable resources.

Staff are able to communicate with colleagues through traditional methods (phone, Instant Message, and email), as well as video conferencing when necessary.

In the coming months, and with the implementation of the Microsoft Office 365 Suite countywide, the ease of virtual communication is expected to grow exponentially.

Program Outcomes

Even though HR has implemented telework and alternate work schedules for the past 10 years, the program became more informal over time. The telework program re-launch helped to refresh the

program structure and clarify expectations when working outside of the office. It also had a positive impact on the organizational culture. It strengthened the trust between managers and staff and provided additional support to our partners and customers by ensuring staff had the ability to be productive both in and out of the office.

The HR Department found there was no change in performance for teleworkers but also acknowledges that telework requires dedication and discipline.

HR leadership support was important in launching a successful program. HR staff consider telework as a very important benefit, and an incentive in attracting new employees. Telework allows staff to have more flexibility and increase work/life balance, resulting in happier, more engaged employees.

Lessons Learned

Because the alternative work schedule was originally implemented in concert with a building closure, many internal and external customers assumed that operations ceased as well. It is of paramount importance teleworkers communicate their work schedule/availability and the best methods to be reached while teleworking.

5. How to Get Started—Launching a Pilot Program

Implementing a telework program may seem daunting at first, but once the program is well established it just becomes part of the way that the organization operates. For that reason, organizations should start with the end result in mind and then follow a step-by-step approach based on best practices.

Sometimes the hardest step is simply getting started. Good intentions and enthusiasm may get sidetracked by other competing internal demands, lack of resources, or shifting priorities. The best way to overcome these potential obstacles is by conducting a telework pilot program. This gives the organization the opportunity to go through the process of testing telework on a small scale, identifying and resolving any start-up issues, evaluating and communicating the results, raising comfort levels (especially for managers), and determining the future direction of the program (expansion or termination). This approach works whether the organization is new to teleworking, has an informal program in place, or has tried and failed at teleworking in the past. The pilot program provides the necessary framework for the organization to get started on a small-scale and learn what works best.

The following set of key telework practices (broken down by phases) are designed to help organizations develop successful pilot programs. Adhering to these practices can help remove barriers to participation. The suggested timeframes are based on conducting the pilot program over a six to nine month period.

Table 5.1. Key Practices for Implementing Successful Telework Programs [2]

Phase 1: Planning Phase (One-Three Months)

- Obtain top-level support
- Establish a cross-functional project team
- Designate a telework coordinator
- Gather baseline data
- Establish measurable telework program goals
- Develop an implementation plan
- Determine what resources will be required
- Develop telework policy and agreement

Phase 2: Implementation Phase (Four-Six Months)

- Provide training/orientation for employees and managers
- Select participants
- Launch program

Phase 3: Evaluation Phase (One Month)

- Conduct post-implementation assessment (interviews, surveys, and/or focus groups)
- Compile and analyze results, prepare reports/briefing materials
- Communicate results
- Determine next steps (phased expansion or termination)

[2] Adapted from the U.S. General Accounting Office, Human Capital: Key Practices to Increasing Federal Telework, 2004.

Phase 1: Planning Phase

Implementing a pilot program begins with proper planning. Most of the work will occur during the planning phase as there are a number of steps associated with this phase: obtaining top-level support, establishing a cross-functional project team, designating a telework coordinator, gathering baseline data, establishing measurable telework program goals, developing an implementation plan, determining what resources will be required, and preparing the telework policy and agreement.

Organizations should be able to complete the planning phase in one to three months. The telework coordinator and project team (discussed below) should focus on completing the various steps in this phase, without getting bogged down in the process.

Obtain Top-Level Support

Interest in teleworking can originate from many levels within in an organization. Some programs are started from the top down as cost-cutting initiatives of top-level management, some from the bottom up at the behest of employees seeking greater flexibility, and others from mid-level managers who view telework as a way to recruit from a wider labor pool or retain top talent. Regardless of where the initial interest

comes from, top-level support is needed for a telework program to be successful. Therefore, it is important to understand where the organization's leadership stands on the issue since this can have a significant impact on the program.

Top-level management may be supportive and view telework as an important organizational strategy. On the other hand, management may have misconceptions about telework and be reluctant to give it a try. Even organizations that have allowed informal telework arrangements may have concerns about formalizing the program and opening it up to a larger number of employees as this can raise concerns about the associated risks and costs. Management's interests and concerns should be factored into the pilot program and used as a basis to evaluate the success of the program.

Gaining support initially may come in the form of simply getting verbal approval from top-level management to proceed with the pilot program, or it may require developing a business case proposal to demonstrate how telework can benefit the organization (see Section 3). Having clear goals based on organizational objectives, a well thought out approach for the pilot program, and keeping top-level management informed through regular progress reports will go a long way toward gaining and maintaining support.

Establish a Cross-Functional Project Team

The role of project team is to plan, implement, and evaluate the pilot program, which may include a single department or multiple departments. Forming a cross-functional project team to get input from various parts of the organization helps get key people involved early in the process. The project team may include the following representatives:

• Human Resources

• Information Technology

- Telecommunications

- Legal

- Risk Management

- Facilities

- Union (if applicable)

- Staff members from various departments

- Telework Consultant (optional)

In large organizations, the project team may include many representatives. For smaller organizations, a group of two or three people may be all that is necessary.

Since teleworking is heavily reliant on computer equipment and technology, one of the most important team members is the Information Technology (IT) representative. The person(s) selected should be highly knowledgeable about IT issues, especially secure remote access and security. Smaller organizations that do not have in-house IT support may need to consult an IT professional.

Some organizations may find it beneficial to hire a telework consultant to assist the project team. Although this is an added expense, a knowledgeable consultant can help reduce the amount of staff time involved, expedite the entire process, and keep the pilot program on schedule.

Designate a Telework Coordinator

A telework coordinator should be designated to oversee the pilot program. The coordinator's role typically includes working with the project team to plan, implement, and evaluate the pilot program and providing status reports to management.

The telework coordinator may either be designated by top-level management, or selected from among the project team members. The time commitment may vary depending on the size and duration of the pilot program, but the person selected will typically serve in this capacity on a part-time basis while performing his/her other job duties for the organization. It is important that the organization select the right individual for this role. Ideally, the telework coordinator should be someone who is an effective project manager, is enthusiastic about the program, and can serve as an internal champion/advocate. The telework coordinator's level of interest and commitment can make all the difference between an outstanding program and one that is mediocre.

Establish Measurable Telework Program Goals

One of the biggest mistake organizations can make is not having a clear understanding of why they are implementing a telework program. The project team should identify and prioritize what goals are most important to the organization. At a minimum, this should include participation rates, frequency (how often employees telework), and employee satisfaction, as well as top-level management concerns or priorities. The project team may also want to include other telework benefits that are in alignment with the organization's overarching strategic goals (e.g., recruitment/retention, office space reduction, customer service, or environmental benefits).

The project team should also determine how success will be measured and implement a method for periodically evaluating progress towards meeting the organization's telework goals. This may include establishing procedures and/or tracking systems to collect data to evaluate the telework program. A study of some of the nation's largest and most successful telework programs conducted by the Telework Coalition[3] identified the performance indicators most often measured by the participating organizations:

- Employee participation

- Employee satisfaction

- Office space utilization

- Recruitment and retention

- Adequacy of training and supervisor support

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[3] The 2006 Telework Benchmarking Study examined the best practices of 13 public and private-sector telework programs which collectively had more than 77,000 teleworkers and nearly 60,000 additional mobile workers. At the time the study was conducted, the participating organizations' telework programs had been in place from three to 20 or more years, with the average duration being 10 years.

Gather Baseline Data

To measure progress towards the organization's telework goals, the project team should gather baseline data at the outset of the pilot program. The data and information collected should be directly related to these goals. If the organization is also considering offering or expanding other alternate work schedules, this should be included in the process as well. Options include employee surveys, executive leadership interviews or surveys, and focus groups.

Employee Surveys

At a minimum, the project team should survey employees to determine the current level of teleworking (if any), interests/attitudes regarding teleworking and other alternate work schedules, and equipment/technology needs.

The survey should be distributed to all employees and managers; however, the organization should clearly communicate that only employees who meet specific eligibility criteria will be considered for participation. This will help prevent false expectations that these options will be made available to everyone.

Online survey platforms, such as SurveyMonkey or Zoomerang, are an easy and inexpensive way to create and distribute surveys and analyze the results.

Executive Leadership Interviews or Surveys

It may be beneficial to interview or survey the organization's top leaders, especially if there is skepticism about teleworking. The interviews or surveys should capture information about attitudes and perceptions about teleworking, as well as perceived benefits or risks. Any concerns raised should be addressed through the pilot program.

Focus Groups

Focus groups can be a useful way to gather qualitative information from managers and employees to help better understand attitudes, perceptions, and concerns about teleworking and other alternate work schedules.

Focus groups are facilitated by a moderator, the person leading the discussion using a set of standardized questions for each group. The moderator may be someone from within the organization or someone from the outside, such as a consultant. Focus groups allow the moderator to interact with the participants, pose follow-up questions, or ask questions that probe more deeply. This provides more in-depth information than is typically collected through surveys alone.

It is helpful to have someone other than the moderator taking notes during the focus groups. The sessions may also be recorded, provided the participants are made aware of this in advance.

Communicating and Using Results

The baseline results should be shared with the project team members and top-level leadership. The results should be used to help determine what resources will be required and how the telework policy and program will be structured. The organization may also want to provide summary information to employees using existing internal communications methods, such as employee newsletters and staff meetings. This will help foster transparency among all staff.

Develop an Implementation Plan

In practice, six to nine months is a suitable timeframe for most pilot programs; however, the project team will want to tailor the actual schedule to the needs of the organization. The plan should include key tasks, identify who is responsible for the completion of each task, and specify the timeframes for completion. The plan should be made available to all members of the team and top-level management and updated, as needed.

The project team should meet on a regular basis to review and discuss progress and prepare regular status reports to top-level management.

Determine Resources Required

The project team will need to determine what, if any, equipment will be provided to the pilot program participants. This decision will largely be contingent on resources the organization has access to, such as surplus equipment, or funding allocated for the pilot program.

In practice, the resources required by teleworkers typically include a computer/laptop, cell phone or smartphone, and internet connection. Some employees may also find it beneficial to be able to print from home. It is also advisable for employees to have a surge protector or Uninterruptible Power Supply (UPS) to protect equipment and maintain productivity in the event of brownouts, power surges, and power failures.

Computer Equipment

Some organizations allow employees to use their own computers when working at home; however, that approach can cause concerns about security. Others provide equipment such as laptops that employees can use to work from home or in the office, but there may be an added cost in doing so.

The project team may want to determine equipment needs through the baseline survey and then work with the IT representative to determine who will provide the equipment – the employees or the organization. If the later, the organization may have existing equipment that could be allocated for the pilot program, or new equipment may be needed. This may require additional funding if new equipment will be purchased. The organization should maintain an accurate inventory of any equipment provided to employees, as well as when the equipment was updated or serviced.

Another factor to consider is who will be responsible for maintaining and servicing the equipment. Generally, this is the employee's responsibility if they are using their own equipment and the organization's

responsibility if they are providing the equipment. If the organization provides the equipment, they may be able to do upgrades and resolve technical issues remotely; otherwise, the employee will need to bring the equipment into the office for servicing.

Decisions regarding who is responsible for providing and maintaining the equipment should be specified in the organization's telework policy.

Communication

Providing seamless communication between teleworkers and those they need to interact with is one of the most vital aspects of making telework work. Forms of communication typically used by teleworkers include telephone, email, instant messaging, and texting, as well as other types of collaboration tools.

As with computer equipment, options for phone service can vary. Table 5.2 on the following page includes a broad range of options for organizations to consider based on information contained in the State of Washington teleworktoolkit.com.

The project team will need to determine what option(s) will work best for the pilot program. This includes determining initial and recurring costs if the organization provides cell phones or smartphones. VoIP services, such as Skype, may be a less expensive alternative.

While it is common for employees to use their own home phones or cell phones when teleworking, there may be privacy concerns if the employee's phone number shows up on the other party's caller ID. Employees should check with their carrier to see if there is a way to block their phone number from appearing.

Texting may be incorporated in the employee's or the organization's cell phone or smartphone plans. Email and instant messaging are typically provided through the organization.

There may be other tools that would be useful for facilitating collaboration for teleworkers and employees in the office such as conference call and webinars platforms like GotoMeeting and WebEx. These tools allow employees to work together effectively wherever

Table 5.2. Telephone Service Options

Phone Service Option	Description and Considerations
Home phone number and service	It may be okay for a teleworker to be contacted on their home phone directly if they rarely work from home and/or if the only people contacting them are internal to the organization. If this option is chosen, it may not be appropriate to apply call forwarding from the office phone to the home phone since other members of the household will likely also be using the phone.
2nd (business) line into the home	For more regular teleworkers and/or instances when communication with external clients and partners is involved, the addition of a 2nd phone line for business purposes might make sense. A decision will need to be made as to who pays for the second phone and phone service. Will the employee pay for it and be reimbursed? Will the phone be provided by the company and the phone service set up through the company's phone service provider (traditional or VoIP)? Will call forwarding to the 2nd line be set up so the same office number is always used regardless of whether or not the employee is working from home or the office? This last option is ideal when the teleworker receives regular calls from clients.
Personal cell phone	Since the cell phone owner is the one that typically answers their own cell phone (versus the primary home line which may be answered by anyone in the home), it may suffice to allow a teleworker to use their personal cell phone to send and receive phone calls while teleworking. A decision needs to be made concerning whether or not the organization will pay for all or part of the teleworkers personal cell phone service each month. Some organizations offer a flat rate reimbursement each month for cell phone service to all of their employees, regardless of whether or not they are teleworking. An organization may or may not want to increase this rate for those employees that are teleworking as there will be an additional drain on their minutes if they increase usage for work-related matters.
Company-issued cell phone	It is also very common for employees to be issued a company-owned cell phone, enabling better tracking of expenses and usage. This approach may be particularly attractive for teleworkers with very heavy phone usage, billable calls, or "on-call" requirements, as well as for departments that would prefer a shared pool of phones for employees with minimal teleworking needs or staggered schedules.
Internet Protocol Telephony	Internet Protocol (IP) telephony, describes a range of technologies that use the Internet Protocol's packet-switched connections to exchange voice, data, fax, and other forms of information traditionally carried over the public switched telephone network (PSTN). Voice over Internet Protocol (VoIP), an effort to standardize IP telephony, enables consumers and businesses to leverage their broadband Internet connections to send and receive calls. In addition to having broadband access, VoIP requires the user to have an IP phone, an analog phone adapter for VoIP, or that the user and the call recipient both have computers with the necessary software, speakers, a sound card and a microphone. Skype, another type of IP telephony, uses proprietary technology to enable phones calls to be made via your computer or Skype phone over a broadband connection.
Unified Communication services	Unified Communication (UC) systems leverage software and networking technologies to bring together the voice, video, data and mobile applications common in most businesses. UC systems allow the user to redirect in real-time voice, text, or email messages to the device closest to them at any given time using a web-based portal to update their preferences. For example, voice calls to a teleworker's office phone could be routed to their home business line on days when they telework from home, or emails could be routed to a PDA or turned into speech for a phone message. UC systems may allow a teleworker to pick up all of their voice messages through a web-based portal.

they are and can also be used to reduce trips for employees located at multiple office locations.

High-Speed Internet Connection

Having a high-speed Internet connection is usually one of the requirements for employees to telework. Many employees already have a high-speed Internet connection at home, but this is something the project team may want to determine through the baseline survey. Most organization do not contribute to employees' Internet costs, but there may be justification for doing so on a case-by-case basis if it is beneficial to the organization.

Peripheral Devices

Some employees may need access to peripheral devices, such as printers or all-in-one machines that can print/fax/scan/copy. Again, this is something that can be determined through a baseline survey and the organization may opt to provide this equipment on a case-by-case basis if it is beneficial. While the equipment itself is not that expensive, the cost of printer cartridges and other supplies should be factored into the decision.

It is also a good idea for employees to use a good surge protector (not to be confused with a power strip) or Uninterrupted Power Supply (UPS) devise to help protect equipment and data from damage due to power surges and outages. Since surge protection devices actually do very little to protect equipment from lightening damage, employees should be instructed to unplug all computer equipment during a thunderstorm (including connections to phone lines). This is the best, and cheapest, way to protect equipment from damage. In practice, if the organization provides the computer equipment, then it would also provide the surge proctor or UPS device.

Technology Guidelines and Training

Once the project team has selected the "right" equipment and tools teleworkers will need, it is important that employees know what is available to them and how to use them most productively. The project team may want to develop technology guidelines that cover services available and how they are accessed. Following are links to excellent examples from the University of Washington and George Mason University:

University of Washington, *Teleworking Technology Guide and Checklist* (November 2012)

https://www.washington.edu/facilities/transportation/files/telework-technology-guide.pdf

George Mason University, *Technology Resources for Teleworkers* (June 2012)

https://itservices.gmu.edu/documents/misc/upload/Technology-Resources-for-Teleworkers.pdf

The project team should also make sure that adequate technology training is provided to teleworkers on the use of the equipment, tools, and remote access. Managers and coworkers may also need to know how to access and use collaboration tools.

Office Supplies

In practice, most organizations allow employees to take home standard office supplies needed to perform work at home. Organization may or may not provide or allow for the reimbursement of other items, such as printer cartridges, depending on budget considerations. The organization's position regarding the use of and reimbursement for office supplies should be clearly stated in the telework policy.

Develop Telework Policy and Agreement

One of the main duties of the project team will be to develop the organization's telework policy, which will serve as a guide to inform potential teleworkers and managers about how the telework program will work. After the pilot program has been completed, the project team should review the policy again and make any revisions that are needed. After the policy is finalized, it should be reviewed and updated periodically.

There are many excellent examples of telework policies available online. Below are several examples:

County of Santa Clara

Teleworking Program Handbook for CEMA Represented Classifications (Dated July 2012).

State of California

California Department of Human Resources Telework Policy (Updated May 2013).

Washington State – Kitsap Telework Project

The 32-page *Guide To Writing a Telework Policy* is an excellent resource. It includes clauses and examples of the following telework policy components based on a review of more than 40 public and private sector telework policies:

- Purpose
- Definitions
- Eligibility
- Application and Approval
- Telework Agreement
- Manager Responsibilities
- Training
- Duration
- Reviews and Evaluations
- Communication & Accessibility
- Work Hours
- Travel Expenses
- Emergency Operations
- Dependent Care & Other Non-employment Responsibilities
- Performance Standards
- Workspace
- Equipment
- Software
- Information and Security
- Legal
- Modification or Termination

The project team may want to take one specific policy that is a good fit for the organization and customize it for its own use, or combine different aspects of various policies into its own unique policy.

In addition to the telework policy, the project team will also want to develop a separate telework agreement that specifies the terms agreed upon be the employee and manager. This should include the physical location the employee will be working from, the schedule (specific days and hours), and the types of duties/task the employee will be performing from home. The employee should be required to acknowledge, in writing, that he or she has received and read the Telework Agreement. The manager should be required to sign the Telework Agreement, either approving or denying the request. If the request is denied, the manager should provide a brief explanation.

Lastly, the employee should be required to complete a Home Office Safety checklist and acknowledge responsibility for providing and maintaining a safe and productive work environment. See Section 9 for a sample Telework Agreement and Home Office Safety Checklist.

Phase 2: Implementation Phase

The implementation phase includes providing training/orientation for employees and managers, selecting participants, and formally launching the program. This phase, which should last for four to six months, allows the organization to test the program on a small scale and determine how things work.

Provide Telework Orientation/Training for Employees and Managers

Providing training for managers and employees is a critical, but often overlooked, part of the implementation process. Sending employees home and hoping they figure it out themselves is not a good business practice and may eventually result in problems. Likewise, managers who have never managed remote workers may need assistance with developing these skills.

Telework orientation/training sessions help employees decide if they are suited for teleworking, or not. Organizations should not only offer, but require, that employees complete the training before they begin teleworking. Even employees who have been teleworking informally should be required to complete the training as they may have developed bad habits. The overarching objectives of the orientation/training sessions are to ensure that employees and managers understand:

- The organization's telework policy, including eligibility criteria

- Critical success factors for teleworking

- How to manage remote workers

The County of San Mateo has developed a series of online telework training sessions for employees, which are described further in Sections 8 of this toolkit.

Select Participants

Not all positions or all employees are suited for teleworking. Furthermore, not all employees want to telework – some may think they would feel too isolated, others prefer to have a clear separation between work and home, and others may realize their home is not a good place for them to work from due to other activities going on during the day. Studies have shown that 30-40% of employees are interested in teleworking and believe that parts of their job are suitable for remote work.

That said, one of the things managers initially struggle with the most is selecting the "right" employees to telework. There are a couple of ways to approach selecting participants for the pilot program. Either the managers may select employees or employees may request to telework. In either case, selection should be based on objective eligibility criteria clearly stated in the organization's telework policy and reinforced in the telework orientation/training. Illustrative examples of eligibility criteria are shown below:

Selection of employees to participate in the telework program shall be based on the following work-related criteria:

- The employee's responsibilities.

- The need for interaction with other staff and external clients.

- Onsite obligations such as meetings/training.

- Impact on the business operation.

- The resources that an employee needs to do his/her job must be easily transportable or available electronically.

- The availability of other qualified employees onsite to provide adequate coverage.

In addition, employees who are considered for telework must demonstrate the following:

- Successful completion of the organization's probationary period.

- A "satisfactory or better" performance rating.

- No history of performance or conduct issues.

- Demonstrated ability to work independently.

- Attention to work time and productivity.

Managers may also find it beneficial to use a Telework Assessment Tool, such as the example shown in Section 9, to further assess an employee's suitability for teleworking.

Launch Program

The project team may find it beneficial to officially launch the pilot program through a kickoff event. This could be held in conjunction with other local or national events (Earth Day, Telework Week, or World Carfree Day) to give the program more prominence. Such events can help to raise awareness, interest, and acceptance of teleworking.

Other ways to promote the program:

- Creating a telework/alternate work schedule intranet site or page

- Briefing managers

- Sending periodic e-mail updates to managers and staff

- Displaying posters or flyers in high-traffic areas

- Writing articles in the company newsletter (such as testimonials)

- Holding brown bag lunches with guest speakers on telework topics

Phase 3: Evaluation Phase

The evaluation phase includes conducting a post-implementation assessment, compiling and analyzing the results (including the baseline data), preparing reports and briefing materials, and presenting the findings. The project team should allow one month to complete these steps.

As with gathering the baseline data, the project team may want to use a combination of surveys, interviews, and/or focus groups. *Again, what is being measured should be in alignment with the organization's telework goals.* The purpose of the evaluation is to show the program's progress, strengths and weaknesses, measure how well the program objectives are being met, and decide how the program should be adjusted to better meet those objectives.

Based on the results of the pilot program and recommendations of the project team, the organization may either decide to extend the pilot program or do a phased expansion to include other departments. The organization also has the option of terminating the program if it failed to meet expectations or address management concerns; however, in practice, this rarely happens.

Creating a Telework Eligibility Assessment Form

This form is designed to help supervisors and employees assess the feasibility of teleworking using a uniform and objective set of general criteria. The assessment covers four main areas:

- **Position Assessment** – Is the position suitable for teleworking?

- **Employee Assessment** – Is the employee well suited for teleworking?

- **Home Office Assessment** – Is the employee's home a suitable place to work from?

- **Workgroup Assessment** – Is teleworking suitable for the workgroup?

This form can be customized for specific departments or business units based on unique requirements that are not specifically addressed through this sample form. For example, some of the general criteria listed under the assessment areas may not be relevant. On the other hand, there may be other unique criteria that should be added to one or more of the assessment areas based on the organization's business needs.

The supervisor and the employee should complete the assessment form as indicated as part of the telework application process. Once completed, the supervisor and employee should meet to review and discuss the results. This process is designed to help identify any potential challenges and give the supervisor and employee a starting point to think through these issues and develop practical solutions. In some cases, there may no barriers to a particular telework arrangement; while in others, it may become clear that the position or the employee is not suitable for teleworking at that time. The reasons should be documented by the supervisor and discussed with the organization's human resources representative if warranted.

One of the common misperceptions (especially among supervisors) is that all employees will want to telework. That is not the case. Studies have shown that only about 30-40% of employees are interested in teleworking and believe that parts of their jobs are suitable for teleworking. Many employees will opt out of the opportunity for a variety of reasons – some prefer coming to the office every day because they like the social aspects of work, some do not think they would be disciplined enough to work from home, while others want to maintain clear boundaries between work and home. This assessment form and process can be very beneficial when it comes to selecting the "right" positions and employees for teleworking.

Telework Candidate

The supervisor should complete this section for each employee under consideration for teleworking.

Employee Name:	
Department/Division:	
Position:	
Supervisor's Name:	
Date Completed:	

1.0 Position Assessment

Not all positions are suitable for teleworking. This part of the assessment is designed to help the supervisor determine if the nature of the work required of a specific position is compatible with teleworking.

The supervisor should assess the suitability of the position using a Yes/No response and noting specific comments/concerns, especially for those areas that could limit the ability to telework. Positions that require employees to be physically present on a daily basis may not be suitable for teleworking (e.g., someone who greets the public or answers the phone). These types of eligibility criteria should be clearly stated in the organization's telework policy and communicated to employees through training and other means.

Criteria	Yes/No	Comments/Concerns
1.1 The position includes tasks that can be accomplished independently.		
1.2 The position requires minimal face-to-face interaction with others.		
1.3 The need for face-to-face interaction can be replaced by other means, such as phone or email.		
1.4 The information the employee needs access to can either be accessed remotely or files/materials can be removed from the office.		
1.5 The quality and quantity of work are easily evaluated.		

2.0 Employee Assessment

Just as not all positions are suitable for teleworking, not all employees are suitable for teleworking either. Generally, teleworking works best for employees who have history of good performance evaluations, work well independently, and are familiar with their specific job requirements.

The supervisor should assess the suitability of the employee for teleworking using a Yes/No response and noting any specific comments/concerns. Employees who have not completed the designated probationary period or who do not meet certain performance ratings are generally not considered good telework candidates. These types of eligibility criteria should be clearly stated in the organization's telework policy and communicated to employees.

Criteria	Yes/No	Comments/Concerns
2.1 The employee has successfully completed the probationary period.		
2.2 The employee received an evaluation of Competent* or above on the most recent employee performance report.		
2.3 The employee demonstrates good organizational skills.		
2.4 The employee demonstrates good time management skills.		
2.5 The employee is comfortable working alone.		
2.6 The employee is familiar with the job requirements.		

*The specific performance evaluation rating can be modified as needed based on the organization's rating system.

3.0 Home Office Assessment

It is important that employees have a suitable place to work from when teleworking; therefore, the home office environment should be taken into consideration during the assessment process. This section of the assessment can either be completed by the employee or the supervisor (with input from the employee) using a Yes/No response and noting any comments/concerns.

In addition, the employee should also be required to complete a home office safety checklist as part of the application/approval process to telework.

Criteria	Yes/No	Comments/Concerns
3.1 There are no significant distractions or activities that would make it difficult for the employee to work at home.		
3.2 The employee has a suitable place in his/her home to work from.*		
3.3 The employee has suitable child care or elder care arrangements in place when teleworking (indicate NA if not applicable).		
3.4 The employee has high-speed Internet access at home.		
3.5 The employee is able to receive and make phone calls when teleworking.		

*For example, a spare room or other designated work area that is out flow of any other activities that may be going on in the household.

4.0 Workgroup Assessment

Part of the assessment process should take into consideration the impact teleworking may have on the business needs of the organization and the workgroup in particular. The supervisor should assess the impacts on the workgroup using a Yes/No response and noting any specific comments/concerns. In some cases, the criteria may be Not Applicable (NA). For the purposes of this assessment, the telework arrangement refers to a particular employee, not teleworking in general.

How often the employee will be teleworking should also be taken into consideration when completing this section of the assessment. In practice, most employees telework an average of one or two days per week. If face-to-face interaction with the public is a key component of the employee's responsibilities, then the position may not be suitable for teleworking if the interaction cannot be adequately accomplished by other means (such as phone or email), or if it places too great a burden on other staff.

The following criteria are based on the County of San Mateo's countywide Alternate Work Schedule Criteria.

Criteria	Yes/No/ NA	Comments/Concerns
4.1 The telework arrangement will maintain or improve department service delivery.		
4.2 The telework arrangement will maintain or improve client services and staff availability to the public.		
4.3 The telework arrangement will be cost neutral (i.e. will not require backfilling of positions or no increase in overtime or holiday pay).		
4.4 The telework arrangement will have no significant negative impact on other County departments, functions or staff.		
4.5 The telework arrangement will maintain or improve the productivity of the workgroup.		
4.6 The telework arrangement will contribute to the hiring or retention of productive and engaged staff.		

6. Technology, Equipment, and Infrastructure

One of the factors that may impact employees' ability to telework is access to information needed to perform their duties when working remotely. This can vary greatly depending on the type of work being performed and the organization's records management system.

Digitizing Records

In some cases, it may be permissible for employees to remove hard copy files from a central office location but, if not, the ability to telework may be greatly reduced. One of the ways to overcome this is by digitizing the organization's records.

The promise of the "paperless" office has not materialized for many organizations; however, teleworking may provide added impetus for converting paper documents into a digital format. Storing paper files can be expensive, especially if offsite storage is required. Retrieving paper documents is time consuming and the possibility exists that they can be misplaced, lost, or destroyed. There are numerous advantages for digitizing records:

- Digital files take up less physical storage space.

- Images can be enlarged or enhanced for greater readability.

- Copies can easily be sent via e-mail.

- Files can be archived in more than one location.

- Files can be printed on archival paper to create a paper archive copy.

- Images can be linked to more than one project or person.

- Files can be quickly located and retrieved by the computer.

- An automated back-up program for computer files will create an archived digital version.

Despite the obvious benefits, digitizing records can be a daunting task. Many decisions need to be made including whether to tackle the effort in-house or to outsource to professionals, what to digitize, how to digitize, where to host the digital records, and how to ensure those records are maintained and preserved. But, in the long run, this will give the organization's employees much broader access to internal records and facilitate teleworking.

Technology and Equipment Best Practices

The Telework Benchmarking Study examined the best practices of some of the nation's largest and most successful telework programs. Collectively, the 13 public and private sector organizations that participated in the study had more than 77,000

teleworkers and an additional 60,000 mobile workers. Table 6.1 contains the findings related to computer equipment, remote access, telecommunications, Internet connection, and collaborative tools. Although the study was conducted in 2006, most of the findings are still relevant for today's teleworkers and mobile workers, the exception being a greater use of cloud computing for remote access.

Table 6.1. Technology and Equipment Best Practices for Teleworkers and Mobile Workers

Component	Best Practices
Computer Equipment	• Laptop computers are the "tool of choice" for teleworkers and mobile workers. Nearly all of the participating organizations provide laptop computers and docking stations to their employees. • Most organizations have standardized on one or two types of laptops, making equipment repair and replacement easier. Computers are typically replaced every three years. Laptops are generally not considered an extra cost for equipping a teleworker; rather, they are already included in the cost for equipping an employee.
Remote Access	• A secure Virtual Private Network (VPN) is the most common means of remote network access. Secure ID tokens are frequently used for an additional layer of security. Thin client remote access applications are becoming more popular, especially where greater security is a concern.
Telecommunications	• Many organizations are beginning to use Voice over Internet Protocol (VoIP), a technology which enables the user to make telephone calls over the Internet. VoIP eliminates the need for a second phone line and significantly reduces long-distance charges.
Internet Connection	• Broadband Internet access is usually required as part of a home office set up. Most organizations do not contribute to this cost unless the employee gives up office space. • Wireless Internet access over cell service is growing in popularity, as is the use of mobile devices such as Blackberries, PDA's, and Internet-enabled cell phones.
Collaboration Tools	• The use of desktop collaboration tools, including video conferencing and file sharing applications, is growing among participants.

Data Confidentiality Best Practices

Cloud Computing

Cloud computing is defined as, "A model for enabling ubiquitous, convenient, on-demand network access to a shared pool of configurable computing resources (e.g., networks, servers, storage, applications, and services) that can be rapidly provisioned and released with minimal management effort or service provider interaction."[4]

With cloud computing, data and programs are stored and accessed over the internet, rather than the computer's hard drive. Employee use an inexpensive thin client device to display a "virtual desktop" that is actually running in the cloud. Examples of applications and services that are best delivered through cloud computing include email and office productivity applications such as word processors, spreadsheets, and presentation.

Privacy and security

Privacy and security are major concerns when it comes to teleworking because employees who work from home may need to access and use sensitive and proprietary data as part of their jobs. Keeping that type of data on a laptop or a home computer can be inherently risky and insecure. With cloud computing, organizations do not have to worry about the issue

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[4] National Institute of Technology and Standards, The NIST Definition of Cloud Computing, 2011.

because information is stored in a secure data center in the cloud and not on the computer's hard drive. Employees who need to work with proprietary data can securely log into the cloud service remotely.

Backup protection

One of the most important aspects of cloud computing is automatic, redundant, and secure backup protection. This eliminates the need for employees to have to come to the office to backup data or to rely on them to do backups themselves.

Productivity

Maintaining productivity is another issue for organizations that support a remote workforce. Teleworkers need to be able to access data and services just as efficiently as they are able to in the office. Using a VPN for remote access can be time-consuming and inefficient. Applications and services hosted in the cloud are often much easier to access.

Collaboration

Cloud computing services also enable better project collaboration because they are easier to access and share with others. Cloud-based work management tools like Microsoft's SharePoint, Google Docs, LiquidPlanner and Basecamp make it easier for teleworkers and project teams to capture and share ideas, files, videos and documents in a safe and secure manner.

Employee Best Practices

When employees work at home, the data and information they routinely use may be accessible to other individuals who would not have access to these materials in a normal office setting. This includes other family members (adults, teenagers, young children, pets), roommates, friends, visitors, and uninvited guests (burglars). Teleworkers need to take extra precautions to maintain the organization's data and information in a safe and secure manner. In addition to following the organization's own specific information

technology and security standards, teleworkers should adhere to the following general best practices:

- If possible, set up the home office in a separate room with a door that can be closed and locked.

- Keep work-related files and confidential information (that can be removed from the office) in a locked storage cabinet when not in use.

- Do not leave confidential information unattended.

- Know who is responsible for backups.

- Use surge protectors to protect equipment from damage from power surges.

- Unplug equipment in electrical storms.

- Turn off desktop/laptop computers when not in use and consider using cable locks for extra security, if warranted.

- Never leave laptops unattended in a vehicle, even in the trunk.

- Do not eat or drink around computer equipment.

- Do not transmit confidential information via any wireless technology, e-mail, or the Internet unless the connection is secure, or the information is encrypted.

- Do not store unencrypted confidential information on a PDA, laptop computer/desktop computer's hard drive, USB drive, CD, flash memory card, or other storage media.

- Password-protect all confidential information and accounts with access to confidential information.

- Do not share passwords, and do not document passwords.

The organization's information technology department may want to develop its own telework-related standards such as the one shown below. These standards should also be included in telework training provided to employees and managers.

Additional Resource:

- ***State of California, Office of the State Chief Information Officer,*** Telework and Remote Access Security Standard (2010)

Technology for Telework

For staff that telework only occasionally or for a limited period of time to complete specific projects, departments can consider providing a pool of laptops and cell phones for employees to check out for use and return when they are done teleworking. A County provided cell phone may help when the employee needs to return calls to the public, but does not want their private cell phone number to be known to the public. Staff may also use their own personal cell phones at their own expense as part of their telework agreement and block their number from being shown when calling individuals or businesses for work purposes.

For staff that regularly telework one or more days per week, departments usually issue a permanent laptop to the employee. As part of a regular teleworking agreement, staff are typically expected to use their own cell phones at their own cost.

The County's Information Services Department (ISD) is in the process of implementing a number of new technologies that will enhance and better support telework. The County's adoption of more cloud-based applications helps to reduce the necessity for employees to be physically present at one worksite in order to securely access programs and information needed for work.

On the Horizon: Upcoming Technology Options

Virtual Desktop

Traditionally, a PC has all of its programs, computer power, graphics power, and storage on the desktop. All programs are installed on that particular computer. County teleworkers currently use laptops and VPN to telework. When employees work from home, the laptop must have all the programs an employee needs to access. The costs to license software to additional laptops can be a barrier to telework.

A Virtual Desktop runs on a data center instead of having the computing take place in the physical computer on your desk. Employees can leave their virtual desktop running, and use any other type of terminal to reconnect to their desktop. They will be able to access programs from anywhere using a wide variety of equipment, such as their own personal tablet, their smart phone, or a work issued device, such as a laptop. The physical device accessing the Virtual Desktop holds no data or information on it, and acts as a projector for the real desktop that runs on a server in the data center.

The benefits of Virtual Desktops include greater security, easier access to programs and software, and reduced costs. Because data is not located on the actual device, security risks are greatly resolved and stolen devices are no longer a security concern. All data stays on the County's side of the firewall and everything is encrypted. Proprietary County programs and software only need to be installed once, which reduces costs, yet can still be accessed on the Virtual Desktop using any device.

The switch to Virtual Desktop will also create cost savings. ISD currently supports about two-thirds of the County. It costs $55/month for ISD to support a physical PC, while it will cost $45/month for ISD to support Virtual Desktop. Purchasing a laptop for telework costs $2,000, while a Virtual Desktop terminal costs $350. Departments can replace PCs at the end of their life with a Virtual Desktop.

The County is beginning to roll out Virtual Desktops. ISD is in the process of building out the back end infrastructure to support a large number of employees using Virtual Desktops. In 2013, ISD assessed approximately 3,500 County computers by department to see which were good candidates for Virtual Desktop and found that 66 percent Countywide were good fits for computer virtualization. Switching an employee's primary computing device at work to Virtual Desktop will allow more employees to be able to telework easily and productively from home. The Health System is the first department to use Virtual Desktop and will implement it in the San Mateo Medical Center. As part of a PC refresh, a large portion of

the Health System will also receive Virtual Desktops. The Health System will have about 750 virtual work stations by the summer of 2014. In this first phase of implementation, teleworkers will still need to use VPN. Over time, a remote, secure portal will be created to access the Virtual Desktop. At that point, VPN will no longer be needed.

However, Virtual Desktop relies on access to broadband internet. There is less broadband available on the Coastside, which would limit implementation for employees working from that location.

Voice Over Internet Protocol (VoIP)

VoIP has many of the same benefits as Virtual Desktop. VoIP allows an office desk phone to ring an employee at any other phone number. The caller would not be aware that someone was teleworking from another location. VoIP helps to extend the office and reduce confusion about people's schedules and how to reach them on a telework day. ISD is currently looking at the FY 15/16 timeframe to fully rollout VoIP.

Office 365

The County will be transitioning to Office 365, allowing email to be more readily accessible from outside the workplace.
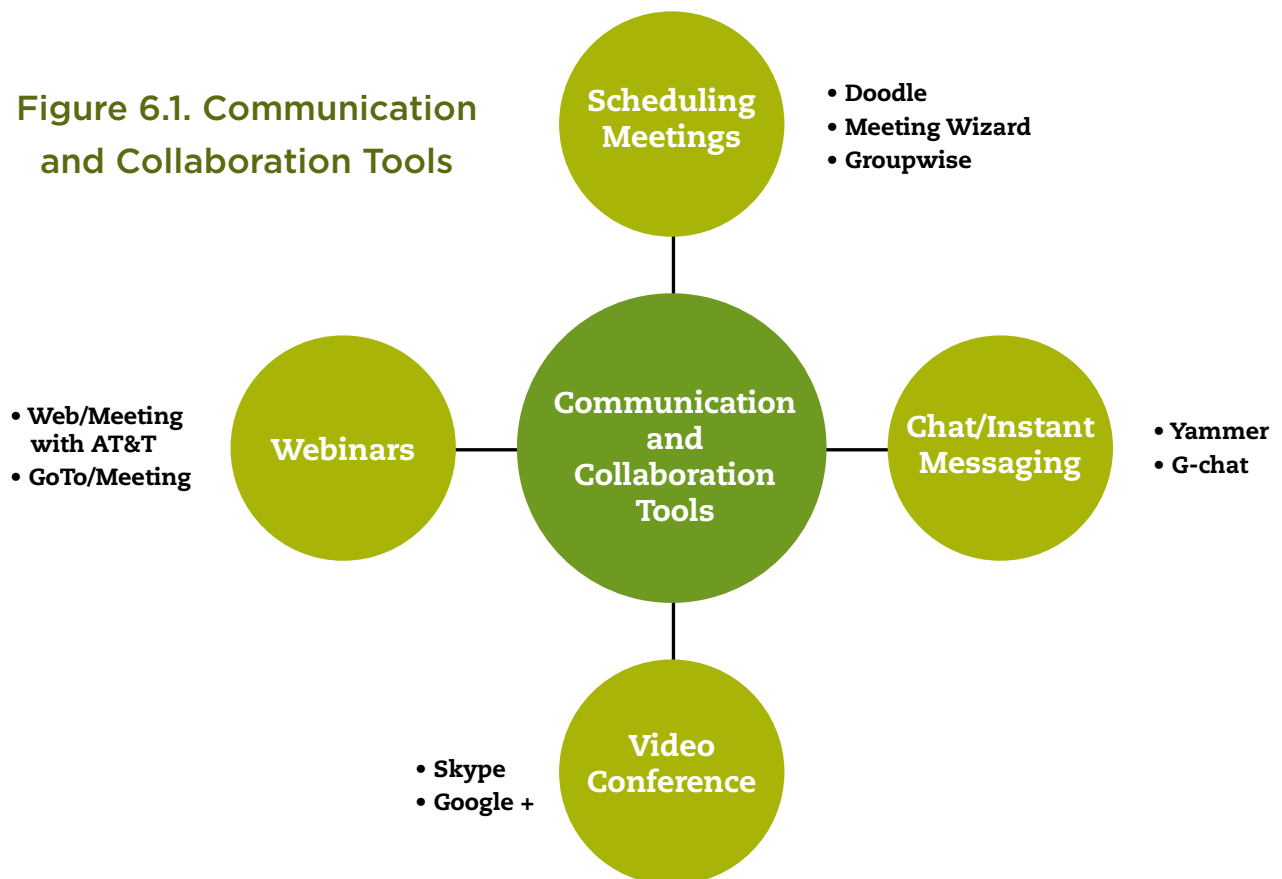
Bring Your Own Device (BYOD) plan

A new Admin Memo (B19) was recently passed by the County's Executive Council, which takes the first step toward using personal phones for County business. This memo begins with mobile phones, but the County is moving toward eventually allowing all types of devices.

Technology Resources for Meetings, Communication, and Collaboration

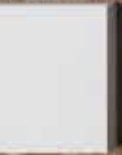There are a variety of communication and collaboration tools available. The figure below summarizes some important options.

Figure 6.1. Communication and Collaboration Tools

- Doodle
- Meeting Wizard
- Groupwise

Scheduling Meetings

Webinars
- Web/Meeting with AT&T
- GoTo/Meeting

Communication and Collaboration Tools

Chat/Instant Messaging
- Yammer
- G-chat

Video Conference
- Skype
- Google +

7. Risk and Liability

Teleworking extends the employee's workplace beyond the organization's traditional physical boundaries, creating the potential for additional risk and liability for both the teleworker and the organization. In reality, there have been relatively few significant problems associated with teleworking based on case law. However, organizations should still be proactive and seek to minimize risk and liability by establishing formal telework programs that include a written policy and agreement, as well as training for teleworkers and managers.

Workers Compensation

One of the primary areas organizations need to be mindful of is workers compensation. Since the teleworker's home essentially becomes an extension of the workplace, workers compensation provisions apply. As with office workers, the primary risks for teleworkers are ergonomic issues and slip-and-fall injuries.

Ergonomic Issues

Very few organizations provide furniture for teleworkers, unless they are giving up space in the office. Therefore, the vast majority of employees will be responsible for equipping their own work area at home with a desk or other suitable work surface and chair.

Although teleworkers are responsible for selecting and equipping their workspace, the organization's role is to provide general safety and ergonomic guidelines in the telework policy, the home office safety checklist, and through training.

Work Surface

Organizations should discourage employees from working on the kitchen table or on a sofa. Ideally, they should have a desk or dedicated work surface comparable to what they use in the office. Options including using office furniture they may already have, purchasing new or used furniture, or obtaining surplus furniture from the organization (if feasible). Figure 7.1 contains "quick tips" for desks from the Occupational Safety & Health Administration (OSHA) ergonomic e-Tools website.[5]

Figure 7.1. OSHA Desk Quick Tips

- Desk surface should allow you to place the monitor directly in front of you, at least 20 inches away.
- Avoid storing items, such as a CPU, under desks.
- Desks should be able to accommodate a variety of working postures.

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[5] OSHA's eTools are web-based products that provide guidance for developing a comprehensive safety and health program. They include recommendations for good industry practice that often go beyond specific OSHA mandates. eTools do not create new OSHA requirements. These guidelines were developed for the traditional office but are applicable to home offices as well.

Chair

Another very important component of the teleworker's home office is a suitable chair. Employees should be discouraged from using a metal folding chair or wooden chair; rather, they should use something comparable to what is used in the office. Figure 7.2 contains chair "quick tips" from OSHA's website.

Figure 7.2. OSHA Chair Quick Tips

- The backrest should conform to the natural curvature of your spine, and provide adequate lumbar support.

- The seat should be comfortable and allow your feet to rest flat on the floor or footrest.

- Armrests, if provided, should be soft, allow your shoulders to relax and your elbows to stay close to your body.

- The chair should have a five-leg base with casters that allow easy movement along the floor.

Working Position

Teleworkers are responsible for setting up their own designated work area at home so it is important that they understand how to set up a workstation that it is ergonomically correct. Figure 7.3 below shows how to maintain a neutral body position while working at a computer. This posture minimizes stress and strain on muscles, tendons, and joints and reduces the risk of developing musculoskeletal disorders such as carpel tunnel syndrome, tendonitis, or adhesive capsulitis (frozen shoulder).

Figure 7.3. OSHA Guidelines for Good Working Positions

- Hands, wrists, and forearms are straight, in-line and roughly parallel to the floor.

- Head is level, or bent slightly forward, forward facing, and balanced. Generally it is in-line with the torso.

- Shoulders are relaxed and upper arms hang normally at the side of the body.

- Elbows stay in close to the body and are bent between 90 and 120 degrees.

- Feet are fully supported by the floor or a footrest may be used if the desk height is not adjustable.

- Back is fully supported with appropriate lumbar support when sitting vertical or leaning back slightly.

- Thighs and hips are supported by a well-padded seat and generally parallel to the floor.

- Knees are about the same height as the hips with the feet slightly forward.

Guidelines for additional Good Working Positions can be found on the OSHA ergonomics eTools website.

Other Telework Policy Issues

In addition to ergonomic issues, the organization's telework policy documents should also address the following:

Work Location and Schedule

The organization's Telework Agreement should indicate the physical address where the employee will be working from, a general description of the work area (e.g., spare bedroom on the first floor of the dwelling), and the agreed upon schedule (days of the week and work hours). It is important to define when and where an employee will be working from a workers compensation perspective. For example, without such documentation, it may be unclear how to handle a situation where an employee gets up in the middle of the night to check on something work-related, trips going down the stairs, and gets injured.

In addition, the organization may want to require a photograph of the designated work area as part of the application/approval process. Although it is common for many telework policies to include provisions for inspecting an employee's home office, in practice this rarely happens. Furthermore, in 2000, the federal Occupational Safety and Health Administration issued a policy directive regarding home-based worksites which states that:

- OSHA will not conduct inspections of employees' home offices.

- OSHA will not hold employers liable for employees' home offices, and does not expect employers to inspect the home offices of their employees.

- If OSHA receives a complaint about a home office, the complainant will be advised of OSHA's policy. If an employee makes a specific request, OSHA may informally let employers know of complaints about home office conditions, but will not follow-up with the employer or employee.

No Meetings in the Employee's Home

In order to prevent potential third-party liability issues for teleworkers and the organization, the telework policy (and training) should clearly state that there will be no meetings in the employee's home, even with other co-workers. If the employee needs to meet with someone, the meeting should be scheduled in another suitable location, such as the office.

Home Office Safety Checklist

Teleworkers should be required to complete a home-office safety checklist as part of the telework agreement. The telework policy and checklist should clearly state that the employee is responsible for providing and maintaining a safe and productive work environment. This includes providing a work area that is ergonomically correct and free of trip hazards. A sample home office safety checklist is shown in Section 9 of this toolkit. The safety requirements should also be reinforced through teleworker training.

Other Things to Consider

In addition to the risk and liability issues discussed above, there are other things that organizations may want to consider. The Business Insurance white paper, *Telecommuting Risks: How to Minimize Liabilities Arising from a Mobile Workforce,*[6] includes additional information on workers compensation issues and case law, as well as employment practice liability (Americans with Disabilities Act, social media, and the federal Fair Labor Standards Act), and cyber risks. The white paper repeatedly stresses the need for organizations to have written policies and procedures that are clearly communicated to employees through training.

[6] One of the subject matter experts interviewed for this white paper discouraged the use of laptop computer for home-based work because they can be carried anywhere and could lead to lap burns and ergonomic problems. This goes against long-standing best practices for telework program implementation. Rather than limit the use of laptops, the concerns raised should be addressed through policy and training.

8. County of San Mateo Training Content

San Mateo County developed three Telework and Alternate Work Schedule Programs trainings.

- Telework 101: Training for Employees Considering Telework

- Telework 201: Training for Employees Approved to Telework

- Telework 301: Training for Supervisors and Managers

County employees will be able to access trainings via the online Learning Management System (LMS). For additional training resources: Refer to Section 10 for publicly available trainings

Telework 101: Training for Employees Considering Telework

Length/Delivery Method: Approximately 15 minutes, online

Audience: SMC employees interested in learning the about the County's telework program.

Prerequisite: None

Course Objectives:
- Understanding SMC's Telework Program

- Assessing Your Suitability for Telework

- Submitting a Telework Request

Module	Presenter	Topics Covered
Module 1 **5 minutes**	**Harriet West** **Telework Consultant**	**Welcome to Telework 101:** • Telework Defined • Teleworking at San Mateo County • Is Telework Right for You?
Module 2 **5 minutes**	**Harriet West** **Telework Consultant**	**Assessing Your Suitability for Telework:** • Individual and Environmental Assessment
Module 3 **5 minutes**	**Harriet West** **Telework Consultant**	**Next Steps:** • How to Submit a Telework Request

Telework 201: Training for Employees Approved to Telework

Length/Delivery Method: Approximately 30 minutes, online

Audience: SMC employees who have been approved to telework.

Prerequisite: Telework 101

Course Objectives:

- Understanding the Benefits and Challenges of Telework

- Understanding the Critical Success Factors for Teleworking

Module	Presenter	Topics Covered
Module 1 **1 minute**	**Harriet West** **Telework Consultant**	**Welcome to Telework 201:** • Teleworking at SMC • Training Objectives
Module 2 **8-10 minutes**	**Harriet West** **Telework Consultant**	**Telework Overview:** • Today's Workforce • Telework Defined • Telework is NOT... • Benefits of Telework • Potential Challenges
Module 3 **18-20 minutes**	**Harriet West** **Telework Consultant**	**Critical Success Factors for Teleworking:** • Building Trust • Work Planning & Communication • Scheduling • Planning and Organizing Telework Days • Home Office Set Up • General IT Considerations • General Safety Tips • Handling Potential Challenges
Module 4 **1 minute**	**Harriet West** **Telework Consultant**	**Additional Resources:** • Resource Materials

Telework 301: Training for Supervisors and Managers

Length/Delivery Method: Approximately 50 minutes, online

Audience: SMC supervisors and managers

Prerequisite: None

Course Objectives:

• Understanding the County's Telework and AWS Policies

• Understanding the Benefits and Challenges of Telework

• Assessing Your Employees' Suitability for Telework

• Managing the New Workforce

Module	Presenter	Topics Covered
Module 1 3 minutes	Harriet West Telework Consultant	**Welcome to Telework 301:** • Teleworking at SMC • Training Objectives • Why Telework?
Module 2 15 minutes	Harriet West Telework Consultant	**Telework Overview:** • Common Misconceptions • Myths vs. Reality • Informal vs. Formal Programs • Characteristics of Successful Telework Programs • SMC Telework Policy Documents
Module 3 10 Minutes	Harriet West Telework Consultant	**Assessing Suitability:** • General Position Assessment • General Employee Assessment • General Home Environment Assessment • Suggested Procedures • Denying Telework Requests
Module 4 20 minute	Harriet West Telework Consultant	**Managing the New Workforce:** • Today's Workforce • Teleworkers vs. Other Employees • Teleworkers' Responsibilities • Supervisors Responsibilities • Potential Challenges • Work Planning, Communication, and Scheduling • Performance and Productivity • Terminating the Agreement • Testimonials
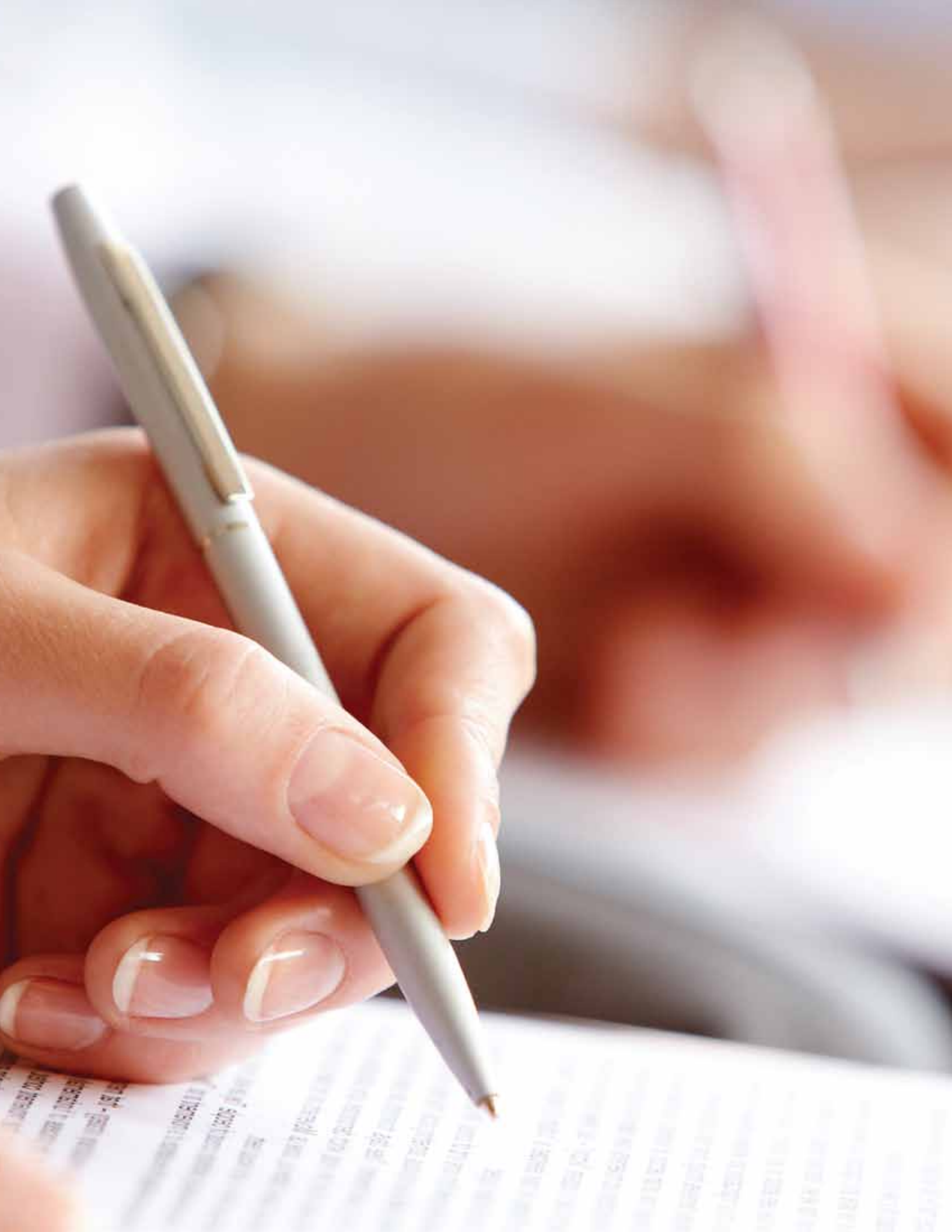
9. Sample Materials

Sample Policies

County of San Mateo Administrative Memo

Countywide Policy

San Mateo County Departments may develop and implement alternative work schedule policies for their staff. The terms of the policies may vary by Department, but all policies must consider the Countywide performance criteria. Details and resource recommendations on schedule options, the Countywide performance criteria and policy issues are detailed below.

Alternative Work Schedule Options

San Mateo County Departments may develop alternative work schedule policies for any or all of the following schedule options:

- **Flexible Hours** Staff on flexible schedules work an eight hour a day, five day week, but may start earlier than 8:00 am or work later than 5:00 pm. Flexible schedules can include start and end times that vary daily, but once a schedule is set, the daily schedule cannot change without the permission of the supervisor.

- **Alternate Work Weeks** Employees on alternate work weeks work 40 hour weeks in four days or 80 hours in nine days. These schedules are called 4/10 and 9/80 schedules and are described below.

  » **9/80 Schedule** – On a 9/80 schedule, an employee works 80 hours in nine, rather than ten, working days per pay period. The employee works eight 9 hour days, and one 8 hour day each pay period and has one day off every two weeks. The eight-hour day and the off day must fall on the same day of the week (e.g. off first Wednesday and 8 hour day second Wednesday). The Fair Labor Standard Act (FLSA) requires that employees working a 9/80 schedule must sign a declaration defining the work schedule. The schedule may not be modified without incurring overtime expenses. Off days cannot be changed to accommodate coverage or other needs and all 9/80 schedules must be entered into the Automated Time Keeping System (ATKS).

  » 4/10 Schedule – Employees on 4/10 schedules work eight 10 hour days per two week pay period with two days off. To prevent the payment of overtime due, no more than forty hours can be worked in any one week. Prior to discussing 4/10 schedules with staff, contact Employee Relations. As a note, the overtime after 8-hours law does not apply to the public sector.

- **Voluntary Time Off** Voluntary Time Off (VTO) is a countywide program that allows employees to reduce their work hours by 1%, 2%, 3%, 4%, 5%, 10% 15%, or 20%. Requests are submitted to Supervisors and Department Heads for approval. The hourly salary rate for employees with approved VTO requests is reduced by the percentage of VTO approved. For example, an employee with 5% VTO would have their

salary reduced by 5% from the date of approval through the end of the fiscal year. Prior approval is required before staff can take off VTO hours. With Department approval, VTO time may be used in hourly, day or block increments.

- **Telework** Telework allows employees to work at a site other than a County office or other County location. That site could be their home, a coffee shop or another location of the employee's choosing. Telework may be done occasionally or on a routine schedule, depending on the type of work done by the employee and the needs of the department.

Countywide Alternate Work Schedule Criteria

All Department alternate work schedule policies should meet the following countywide criteria:

- Improve or maintain Department service delivery

- Improve or at a minimum maintain client service and staff availability to the public

- Be cost neutral – i.e. no backfilling of positions required, no increase in overtime or holiday pay

- Have no negative impact on other County departments, functions or staff

- Improve or maintain employee productivity

- Contribute to hiring and retention of productive and engaged staff

Departments should use the criteria above to establish baseline and ongoing performance measures against which they can track the success of their alternative work schedule policies.

Issues to Consider in Developing a Telework Policy

Departments developing alternative work schedule policies or considering revising existing policies should work the Human Resources Department if they have questions or concerns. Human Resourcesmust always be provided a copy of the Departments policies. In the development or review of these policies, Departments are strongly encouraged to address the following issues:

- **Eligibility** Not all positions are good candidates for alternate schedules, nor are all employees automatically eligible. Departments need to consider the types of jobs that are eligible along with specific individual requirements, including performance and attendance history. Employees that have less than competent reviews, have not passed their probationary period, are in training and/or need close supervision will usually not be eligible for alternate schedules

- **Designation of Core Days and Business Hours.** To minimize the impact on office scheduling, departments that implement flexible schedules are encouraged to establish "core" day(s) of the week, when all staff are expected to work on-site. Core days may not be an "off-site day" under an alternative work program. Departments are also encouraged to establish "core" hours of the day, when staff working that day are expected to be in the office. Core hours may not be "out-time" under a flexible schedule.

- **Supervisor Training** Departments that implement an alternative work policy should encourage supervisors and managers to participate in Human Resources' trainings on managing staff on alternative schedules. Training topics include: assessing employee eligibility, managing a mobile workforce, tools for supporting employees working an alternative work schedule, defining performance targets, and measuring the impact of alternate schedules on individual and team performance.

- **Evaluation of Alternative Schedules** Alternate work policies should include both individual and department-wide evaluations to ensure that the Countywide criteria are and continue to be met. The length of the review period is up to the Department, but for pilot programs, six months is suggested and annual reviews are recommended for on-going programs. For individuals, if at any point during the contract period, any aspect of performance is compromised by the alternative schedule, the supervisor should meet with the individual to discuss the problem. If the problem cannot be resolved, the schedule should be changed.

Resources

Many San Mateo County Departments have developed and implemented successful alternative schedule policies that can be used as templates by other departments. Human Resources is compiling a reference file of these policies and also has policies and best practices developed by other public agencies and the private sector. Human Resources is also putting together a training to help supervisors and manager's be successful in implementing alternative work schedules. Departments interested in developing a policy are encouraged to start by reviewing the files of existing policies and speaking with Human Resources and other Departments that have successfully implemented programs.

Sample Departmental Policy

HEALTH SYSTEM   POLICY NO: X

TELEWORK POLICY AND DIVISION RESOURCES   EFFT DATE: X

TELEWORK

PURPOSE

This policy permits divisions to approve employees for telework, which for the purposes of this policy is: performing normal job functions in a location (usually selected by the employee) other than an employee's primary workplace as part of a regular work schedule.

The Health System supports telework in order to promote work efficiencies, maintain a high-level of customer service, reduce employee commute costs and time and reduce greenhouse gas emissions resulting from various means of commuting.

Teleworking is not always desirable or feasible and therefore it is up to each division to modify the telework program to meet their business requirements.

Hours of Work and Availability

Work hours, compensation and vacation schedules will conform to the Ordinance Code, to MOU provisions, Fair Labor Standards Act (FLSA) provisions, and to terms otherwise agreed upon by the teleworker and their supervisor.

Teleworking is not intended to be used in place of sick leave, vacation, or other types of leave. Normal division policies apply when requesting for sick leave, vacation, and other types of leave.

Supervisors may require employees to report to the central workplace on a scheduled telework day as needed for work-related meetings, due to being short staffed, or other reasons.

County-Owned Equipment

Authorized use/users - County-owned equipment may be used only for legitimate County purposes by authorized employees.

Employees are responsible for protecting County-owned equipment from theft, damage and unauthorized use.

Maintenance – County-owned equipment used in the normal course of employment will be maintained, serviced and repaired by the county.

Employee-Owned Equipment

When employees are authorized to use their own equipment, the Health System does not assume responsibility for its cost of equipment, repair, or service.

Telework Costs

The Health System will not pay for costs incurred by employees in the use of a telework location.

County Information

Employees must safeguard protected information used or accessed while telework.

Supervisors must follow County procedures for employees to work on restricted-access information or materials at alternate work locations. Employees must agree to follow County-approved security procedures in order to ensure confidentiality and security of data.

Agreements must be HIPPA compliant and any violations must be reported immediately.

DIVISON RESPONSIBILITIES

Identify Functions/Positions Appropriate for Telework

Telework is not feasible for all positions within a division and suitability is best determined by job functions.

Functions that usually work well in a telework arrangement include:

- Reading, research, writing and editing including communications, charts, planning

- Data analysis, data entry and "number crunching"

- Phone calls

- Participation in conference calls, webinars and computer trainings

- Work typically completed at a desk w/out special equipment

Functions that usually don't work well in a telework arrangement include:

- Client or customer interaction

- A physical presence in a certain location (such as reception or public interfacing)

- Collaborative planning or in-person meetings

- Supervision of employees requiring "in-the-moment" feedback or performance improvements

- Significant face-time

- On-site duties such as photocopying, answering phones, use of specific equipment, direct administrative support

Modify Work Agreement

A sample work agreement for Health System divisions is provided as a tool for establishing shared expectations between employees and supervisors regarding the telework arrangement. The following considerations may be helpful to include in modifying the telework agreement to meet division needs:

- Telework may be limited to employees who have passed their probationary period and received competent or exceptional performance evaluation(s).

- the duration of the agreement (it is common to limit the term to 6-12 months)

- the work schedule and any process for changing it

- type of work/ product to be accomplished during telework

- how routine communication between the employee, supervisor, co-employees, and customers will be handled

- the equipment and/or supplies that will be used, and who is responsible for providing and maintaining them

- any applicable data security procedures

- how productivity will be measured

- required frequency of communications including checking email and voicemail

Determine How to Meet Equipment and Materials Needs

Process for supplying equipment and materials needed for telework is specific to each division but each division will need to develop a process that works for them to meet this need.

Sample FAQs

From the County Health Department:

Is telework aligned with the County's Human Resources policies?

Yes. Administrative Memorandum E-9 supports flexible work schedules, which includes telework, and gives each department the authority to implement a program that meets their business needs. The County has a number of programs which support flexible work schedules including the use of 9/80 or 4/10 work schedule and the VTO Program. The County, through the County Manager's Office, was also selected as recipient for the Metropolitan Transportation Commission's Last Mile Grant and increasing the use of telework is one of the strategies funded.

Creating and implementing a telework plan for my program is a lot of work, why should I bother?

The Health System allows divisions to develop a telework program, but doesn't require anyone to promote or implement telework. There are a lot of benefits from teleworking to both the department and the employee:

- 22% of the County workforce is currently eligible to retire. Soon we will be competing for new talent.

Multiple studies have documented that the new generation of employees prioritize jobs where they have flexibility. If the Health System wants to keep attracting the best and the brightest, we need to be competitive with other employers, and being flexible where feasible is a part of that.

- The Health System does a lot of things to help our employees stay healthy. One of these is encouraging a work/life balance. By reducing commute times we encourage employees to spend more time with their families, to exercise or maintain out of work interests. Studies have found that employees that engage in activities which are important to them outside of work have lower rates of burnout.

- California passed aggressive legislation to reduce green house gas emissions. In the Bay Area, a big contributor is people commuting to work in cars. We know that San Mateo County has a high cost of living and that many of our employees don't live close to their jobs. Reducing commuting wherever possible helps our planet and makes us a part of the green house gas reduction solution.

What does success look like?

First and foremost, supervisors want to make sure that the decision to approve Telework does not have negative impacts to the client or final work product. They also want quality and amount of work to be equal to or higher than what they produce in the office due to the benefit of being in a different location. Finally, they want both the supervisor and the staff to be content with the work arrangement, and see it is a benefit.

How do I maintain a team environment if employees aren't working in the same place?

A lot of the things that supervisors and manager's do to create a sense of team are still applicable in a telework environment; celebrating successes, sharing accomplishments, celebrating important events, establishing brainstorming sessions, team meetings, team events, measuring progress on shared goals etc...

Some things that divisions with telework staff do are: Set core office days – this is a set day of the week when no one teleworks so that all staff have some face time with each other and informal "desk" meetings can take place; increase the use of teleconferencing; create a central schedule and contact information so that everyone knows how to reach each other and when colleagues are in the office.

What can I do about the need for computers and phones during telework?

Figuring out the logistics so that equipment isn't the barrier to telework seems to be one of the major obstacles for divisions/programs that want to increase the use of telework. Here are some smart practices that some divisions are using:

Computers:

- Create a pool of laptops that staff check-out on telework days.

- Authorize VPN access for any staff who is approved to telework and use the "cheat sheet" for mapping shared drives so that document control doesn't become an issue

- Allow staff to use their personal computer.

- When computers are updated, install laptops with docking stations, monitors and keyboards instead of

desktop computers. Laptops are slightly more expensive than the standard desktop, but can result in other cost-savings. Laptops aren't appropriate for all job functions so ISD will have to weigh in on a case by case basis.

Phones:

- Allow staff to use their personal phone, recognizing that they will not receive reimbursement. Use the "cheat sheet" for blocking a personal # for staff who are calling clients or anyone else they don't want to have their personal #.

- Create a pool of cell phones that staff check-out on telework days.

- Allow staff to forward their work phone to a personal or work cell phone so that there isn't a delay in receiving messages/calls; see the "cheat sheet" for how to do this.

How will I know if my staff are doing their job if I can't see them?

Most performance can't be measured by the amount of time an employee is at his/her desk. Use the same measures you would use in managing employees who are not teleworking. Positions where a person being in a certain location for a certain amount of time is a measure of performance are not good candidates for telework. Some divisions have found it helpful to work with employees just starting to telework to identify what work they will do during a certain day or to establish measurable goals (e.g. # of calls completed; # of data tables entered etc...). It is also helpful to identify any tasks that can not be completed during telework and whether performance in these areas will be impacted by telework.

How do I terminate a telework arrangement?

Telework is a voluntary arrangement between the supervisor and the employee and can be ended by either party at any time. Many supervisors have found that it is helpful to assign a trial period of a few weeks to a few months to new telework arrangements so that both employees and supervisors can see if it is working.

I don't want to reinvent the wheel, how can I learn from what others have already done in this area?

Many programs are already successfully using telework and are willing to share what has worked with others.

Health Administration has also created a number of "cheat sheets" which serve as guides to common processes that employees need to know how to do when teleworking. If you think of other guides that would be helpful, let Angela know so that these can be shared across the Health System. Currently available "cheat sheets" include:

- How to block a # from appearing on caller ID

- How to forward a County phone to an outside phone #

- How to calculate mileage for meetings attended from a telework location

- How to map shared drives through VPN

- Ergonomic check-list

Sample Agreements

Telework Agreement Template

The following is an agreement between the employee and _____ Division on the terms and conditions of telework:

1. The employee and supervisor have both read, discussed and agree to follow the Health System and division telework guidelines and policies.

2. This telework agreement begins _____ and ends _____. An initial review will be done on _____ to make sure the telework arrangement is working for everyone involved.   If this telework arrangement is extended beyond the date noted, a new agreement will be discussed, signed and submitted.

3. Employee or Division may terminate participation in telework at any time. *If the division has a policy related to notification to terminate telework, indicate that here.* _____

    _____

WORK RESPONSIBILITIES AND EQUIPMENT

1. All assigned work will remain the same as in a non-teleworking arrangement. OR The employee and supervisor have discussed the following job responsibilities and agreed that:_____

    _____

    _____.

    Some job responsibilities might not be appropriate for telework and may need to be completed on in-office days; other responsibilities may require different processes when completed via telework. This is a place where supervisors and employees can talk about and agree to any of these changes in workflow.

2. Employee will follow all HIPAA procedures and apply approved safeguards to protect County records from unauthorized disclosure or damage, and will comply with the privacy   requirements set forth by the County and will immediately report any violations.

3. Employee will code the time they Telework in the Automated Time Keeping System (ATKS) with the code 001-TW.

4. Employee who uses County-owned equipment agrees to protect such equipment in accordance with County guidelines. For example: laptop computers will not be left in cars unattended; Protected health information will not be stored on flash drives lacking encryption etc...

5. Employee who uses his/her person equipment such as a computer or phone understands that the County will not provide compensation or maintenance.

6. *List any other details related to agreements about equipment. Example: Employee has been approved for VPN and installation of VPN software has been scheduled; Employee has been approved for use of the GroupWise chat function and the function has been enabled.* _____

    _____

    _____

COMPENSATION/BENEFITS

1. All salary rates and leave accrual rates will remain as if the employee performed all work at the central workplace.

2. Employee will be compensated in accordance with the County/ Labor MOU for overtime work that has been requested by his/her supervisor and approved in advance. Employee understands that overtime work must be approved in advance by the supervisor.

3. Employee must obtain supervisory approval before taking leave in accordance with established office procedures.

_____

Employee Name

_____

Employee Signature   Date

_____

Supervisor Signature   Date

_____

Division Director Signature   Date

EMPLOYEE CONTACT INFORMATION

Employee Name: _____

Employee Contact Number: _____

WORK LOCATIONS AND SCHEDULE

Employee's central workplace is: _____

Central work location: _____

Employee's alternate work location is: _____

Alternate work location: _____

Telework days/hours: _____

Any other approved alternative work schedule (such as VTO, 9/80?)_____

Week 1	Location	Start	Finish	Note (e.g 9/80 day off)
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Week 2	Location	Start	Finish	Note (e.g 9/80 day off)
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				

Equipment needed for telework		
Item	Personal/County?	Comments
Computer		
Internet Access		
Printer		
Phone		
Specific software etc...		

*A copy of this form should be given to_____ *(filled in by divisions).*

County of San Mateo Telework Agreement

Telework is working at a location other than a conventional office. Telework is an option that management may choose to make available to employees when a mutually beneficial situation exists. It is not a universal employee benefit; employees do not have a "right" to telework and this work option may be terminated by either the employee or the county at any time.

Changes in job classification, duties, assignments, projects, as well as changes in business and/or operational needs may have an impact on suitability of telework; therefore, supervisors/managers are responsible for periodically assessing this agreement with the employee to address any change in suitability.

The following conditions for telework must be agreed to by the employee, the employee's supervisor/manager, and department head (or his/her designee) in advance of an employee beginning to telework. The conditions must be revisited and agreed to on an annual basis.

Section One: Telework Information

_____
Employee Name   Supervisor/Manager Name

The parameters of this Telework Agreement are valid for the following period of time:

☐ Initial Trial Period 3-6 months _____to_____

☐ Annual Recertification & Renewal _____to_____

TELEWORK SCHEDULE

It is understood that telework days must be scheduled in advance and approved by the supervisor/ manager. At certain times, it may be necessary for the telework schedule to be revised to ensure critical deadlines are met or to attend meetings. Any changes by the employee in the agreed upon schedule must be pre-approved, and when permanent, documented and appended to the Telework Agreement.

This arrangement must be reviewed and renewed at least annually to ensure the standards for participation are being followed.

The following telework schedule is being established:

Primary Telework Site (Address)			
Number of Telework Days		☐ per week	☐ per month
Telework Days of Week/Month	☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday _____ days of the month		
	Monday	From: _____	To: _____
	Tuesday	From: _____	To: _____
	Wednesday	From: _____	To: _____
	Thursday	From: _____	To: _____
	Friday	From: _____	To: _____
	Saturday	From: _____	To: _____
	Sunday	From: _____	To: _____

The employee agrees to complete assignments to be worked on at home, or an alternate location, by the agreed upon delivery dates. The supervisor/manager will provide the teleworker/ employee with all work assignments.

Section Two: Telework Standards

When a Telework assignment is agreed upon, the following standards apply:

Part I - General

1. Telework is entirely voluntary and may be terminated by the employee or the County at any time.

2. The duties, obligations, responsibilities and conditions of an employee's employment with the County are unchanged. Employee's salary, retirement, benefits and County-sponsored insurance coverage are unchanged.

3. Employees remain obligated to comply with all County rules, policies, practices and instructions. Violations of these rules, policies, etc. may result in preclusion from telework or disciplinary action, up to and including termination of employment.

4. The manager/supervisor and the employee will create a work plan and agreement on the work that is to be completed while teleworking. The manager/supervisor will review the results of the work with the employee on a regular basis to ensure that work expectations are being met.

5. The business needs of the County on-site office may take precedence over telework days. Employees may be required to be on-site during a regularly scheduled telework day.

6. Employees who telework must be available to communicate with those whom he/she normally conduct business (e.g. supervisor, clients/the public, colleagues, management team, partners, etc.) by phone and/

or email while teleworking. Employees must respond to inquiries in the same fashion, and within the same timeframes, as he/she would if he/she were in the office. In addition, employees must ensure that in-person meetings are not delayed due to telework schedules.

7. The employee is to be working in the same fashion while teleworking as he/she would if he/she was in the office; non-work related interruptions must be kept to minimum. Responsibilities and tasks need to be completed with the same importance and attention as they would be if they were tended to in the office. **Telework is not a substitute for dependent child or elder care.**

8. Employees who telework will exercise the same precautions to safeguard electronic and paper information, and protect confidentiality, as the employee would in a traditional office environment.

9. Employees who telework are encouraged to participate in all surveys, studies, inquiries, reports or analysis relating to telework. The data collected may be made available to the general public without identification of employees.

10. Telework Agreements are valid for a maximum of one year. On an annual basis employees and supervisors/managers must review the Telework Agreement and Safety Checklist to ensure compliance and standards.

Part II - Work Hours and Work Space

11. Work hours, overtime compensation and vacation schedule must conform to the County Code, the provisions agreed to in the respective **Memorandum of Understanding (MOU)** and to the terms (I.e. approved work schedule) otherwise agreed upon by employee and the manager/supervisor. Requests to work overtime, use sick leave, vacation or other leave must first be approved by the employee's manager/supervisor in the same manner as when working in the office.

12. If an employee is not able to telework, the employee must code his/her timecard using the appropriate time. (I.e. if an employee is sick he/she must use sick leave or other accrued time to cover the hours not worked.)

13. All time teleworked will be coded as 001-TW in the Departments respective time tracking system.

14. Employees should designate a primary work space for telework which is in compliance with the **County's Ergonomic Office Standards.** In addition, the work space should be maintained in a safe condition, free from hazards and other dangers to employee and equipment.

15. The employee's workspace must comply with safety standards, as outlined in the **County Occupational Health & Safety Plan.** The employee remains liable for injuries to third persons or members of employee's family on employee's premises.

Part III Supplies, Equipment and Costs

16. The costs associated with telework are the primarily the responsibility of the employee. The Department will provide for standard office supplies (pens, paper, pencils, etc.) and in some instances some departments may provide equipment or software if feasible, and approved by department management.

17. If/when County equipment is provided to the employee, the employee is responsible for seeing that the equipment is properly used. The County will provide for repairs to County equipment.

18. In the event of delay in repair or replacement of equipment or any other circumstances under which it would be impossible for the employee to telework, the department may be assign the employee to work at another location.

19. Employees must adhere to the same use of office supplies, software, and equipment/furniture. County equipment and office materials are intended for county business only and are not for the personal use of the employee and/or his/her family/non-County related business. County-owned or issued equipment may only be used by the employee to whom the supplies/equipment has been issued; any access by third parties is prohibited.

20. When the employee uses their own equipment, the employee is responsible for maintenance and repair of equipment.

21. No other costs will be covered by the County unless prior written approval is given.

Additional Departmental Terms

_____

_____

_____

_____

_____

I have reviewed the conditions of this Teleworker Agreement with my manager/supervisor and agree to the conditions. The terms of this Agreement will remain in effect until the Agreement is terminated or amended in writing by either of the parties, or the approved teleworking period ends.

_____
Employee Signature   Date

_____
Department

_____
County Office Address   County Telephone Number

_____
Telework (Home) Address   Telework (Home) Phone Number

_____
Manager/Supervisor   Date

County of San Mateo Telework Request

Telework is an option that management may choose to make available to qualified employees. It is not a universal employee benefit; employees do not have a "right" to telework. The Department reserves the right to accept or reject the teleworker's request. Employees wanting to telework should submit **Section One.** The manager/supervisor completes **Section Two-Three** and forwards to the Department head (or designee) for approval/denial.

Section One – Telework Proposal
(to be completed by Employee)

Employee Name: _____

Employee Contact Number: _____

Position: _____

Proposed Telework Address: _____

Has the department determined your position to be suitable for telework? ☐ Yes ☐ No

Have you completed Telework Training? ☐ Yes ☐ No   If no, date planned: _____

Proposed telework schedule

Primary Telework Site (Address)			
Number of Telework Days		☐ per week	☐ per month
Telework Days of Week/Month	☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday _____ days of the month		
	Monday	From: _____	To: _____
	Tuesday	From: _____	To: _____
	Wednesday	From: _____	To: _____
	Thursday	From: _____	To: _____
	Friday	From: _____	To: _____
	Saturday	From: _____	To: _____
	Sunday	From: _____	To: _____

_____
Employee Signature   Date

_____
County Office Address   County Telephone Number

Section Two – Individual & Environmental Telework Assessment

(completed by Supervisor/Manager)

Individual and Environmental Telework Assessment

Prior to creating a telework agreement, the supervisor/manager must assess if the telework request will be practical and beneficial, meeting program, operational, and employee personal needs.

Meeting the assessment criteria does not guarantee approval to telework. Approval is given on a case-by-case basis; however, for the request to be considered, an employee must meet all of the requirements below.

Considerations of the proposed Telework Environment and Resources		
Yes	**No**	
☐	☐	Does the employee have the necessary knowledge to perform the required job tasks away from the office?
☐	☐	Has the employee demonstrated that he/she is reliable, responsible, self-directed and able to work independently in performing his/her work duties?
☐	☐	Has the employee demonstrated the ability to establish priorities and manage his/her time effectively?
☐	☐	Is the employee able to effectively complete work with minimal supervision/direction?
☐	☐	Does the employee's job performance meet or exceed expectations?
☐	☐	Will teleworking permit the employee to support the work of others and contribute to business operations in the same/similar manner as if the employee was in the primary County office location?
☐	☐	Will the employee continue to be accessible to internal and external customers and clients in the same/similar manner as if the teleworker was in the primary County office location?
☐	☐	Has/will a Telework Agreement be created, signed and agreed to by the employee and the manager/supervisor, at minimum on an annual basis?
☐	☐	Have/will telework expectations and goals be established?
☐	☐	Has the employee confirmed he/she has the computer resources, internet connection, and other information technology needs for the required productivity?
☐	☐	Are there remote access hardware limitations (I.e. able to access all necessary programs and systems)?
☐	☐	Does/will the teleworker have the supplies, equipment, and access necessary to work efficiently and effectively at the alternative work location?

Section Three – Certification and Approval

(completed by Supervisor/Manager and Department Head/Designee)

Manager /Supervisor Name: _____

Manager /Supervisor E-mail: _____

Manager /Supervisor Phone:_____

Have you completed Telework Training? ☐ Yes   ☐ No   If no, date planned: _____

Does your assessment of the individual and the proposed Telework   ☐ Yes   ☐ No
Environment indicate a telework arrangement will be practical and beneficial?

Has the department determined your position to be suitable for telework?   ☐ Yes   ☐ No

☐ Approved   ☐ Denied (provide reason)

_____
Manager/Supervisor Signature   Date

☐ Approved   ☐ Denied (provide reason)

_____
Department Head/Designee Signature   Date

Denial Reason: _____

_____

_____

_____

_____

Home Office Safety Self-Certification Checklist Template

Maintaining a safe and secure home office is the teleworker's responsibility. Telework applicants should inspect their home office work area, complete this form, sign and date below, and submit with their Telework Agreement.

Telework site address: _____

Description of work area:_____

General	Yes	No
1. Floors are clear and free of hazards?	☐	☐
2. Work area is reasonably quiet and free of distractions?	☐	☐
3. Files drawers are not top-heavy?	☐	☐
4. Phone lines and electrical cords are secured under a desk on the along wall, and away from heat sources?	☐	☐
5. Temperature, ventilation, and lighting are adequate?	☐	☐
6. First aid supplies are readily available?	☐	☐
Fire Safety		
7. Walkways, aisles, and doorways are unobstructed?	☐	☐
8. Working smoke detector covering the designated work space?	☐	☐
9. Charged, accessible fire extinguisher in area?	☐	☐
10. More than one exit from work area?	☐	☐
11. Work space is kept free of trash, clutter, and flammable liquids?	☐	☐
Electrical Safety		
12. Computer equipment is connected to a surge protector?	☐	☐
13. Electrical system is adequate for office equipment?	☐	☐
14. All electrical plugs/cords/outlets are in good condition? No exposed/damaged wiring?	☐	☐
15. Extension cords and power strips not daisy chained and no permanent extension cord in use?	☐	☐
16. Equipment turned off when not in use?	☐	☐
17. Electrical outlets are grounded with 3-pronged plugs?	☐	☐

Workstation Ergonomics	Yes	No
18. Office furniture and equipment ergonomically correct?	☐	☐
a. Desk is 29 inches high?	☐	☐
b. Chair is sturdy and adjustable with backrest and casters appropriate for floor surface?	☐	☐
c. Keyboard is in line with wrist and forearm position?	☐	☐
d. Monitor is 20-24 inches from eyes and top of screen is slightly below eye level?	☐	☐
Other Safety/Security Measures		
19. Files and data are secure?	☐	☐
20. Materials and equipment are in a secure place that can be protected from damage or misuse?	☐	☐

_____

Employee Name   Date

_____

Employee Signature   Manager Initial

County of San Mateo Safe and Effective Telework Environment Checklist and Self Certification

Before beginning to telework, employees must review and initial the components of a Safe and Effective Telework Environment, then sign and certify that they have reviewed and understand the requirements to create a healthy, safe, and effective telework space, and are aware of what to do in the event of an injury in the telework space.

The opportunity to participate in a telework program is offered with the understanding that an employee is responsible for ensuring that his/her telework environment is both a safe and an effective place of work. The telework environment must comply with all County and Departmental health, safety, and information security programs and policies, including but not limited to the County Occupational Health and Safety Plan, County Ergonomics Program/Policy, County's Portable Computing Policy, the Countywide Information Technology Standards, the County Internet Policy, County Ergonomics Policy for Computer Operations and Departmental Injury, Illness and Prevention Programs. Failure to do so may be justification for termination from the telework program.

Name of Employee: _____

Employee Telework Phone: _____ _____ _____

Employee Office Phone: _____

Name of Supervisor: _____

Supervisor Phone: _____

Initials	Training	
Prior to completing this self-certification, all employees who wish to telework must complete the online Telework and iMitgate training courses.		
	Telework Training	An online training available to all employees interested in telework. The training covers basic telework information, as well as information regarding suitability for telework and critical factors for successful telework.
	iMitigate	An online self-assessment tool and interactive training geared toward providing information to mitigate computer-related injuries.

Initials	General Environment	
General requirements for lighting, heating and ventilation, cleanliness and organization, and noise levels in the telework space:		
	Lighting	The telework area should be adequately illuminated, enabling the employee to perform work without eyestrain or glare. More information on lighting standards is available in the Ergonomic Office Standards.
	Heating and Ventilation	The telework area should be properly heated and ventilated. If a work place is too cold or too warm, it can be difficult to concentrate and could cause harm.

	Cleanliness and Organization	Employees should ensure that the area is: • Free of clutter, tripping hazards and has a clear path for travel. • Organized to safely support all equipment to prevent the danger of falling. • Arranged to securely store heavy items on sturdy stands, placed close to walls, and filing cabinets are filled from bottom to top and/or balanced to prevent tipping. • Organized so that potentially hazardous chemicals are kept out of harms way.
	Noise Levels	Employees should avoid or keep distracting sounds to a minimum by diffusing unavoidable noise by shutting a door or using a room divider. More information on noise levels is available in the Ergonomic Office Standards.

Initials	Workstation Arrangement	
Adhering to the following criteria will assist in ensuring a safe, ergonomically sound, and effective telework environment:		
	Ergonomics	The telework space must be arranged so that it is in compliance with the Ergonomic Office Standards outlined in the County Ergonomics Policy. Employees can complete an Ergonomic Self-Assessment .
	RSIGuard	RSIGuard, the County's desktop ergonomic software solution that reduces repetitive strain injuries must be installed on all County issued equipment.

Initials	Electrical	
	Electricity	Employees should have enough electrical outlets in the room to avoid overloading any circuits by using proper equipment, such as surge protectors. • Arrange the electrical and phone lines and equipment to: • Avoid tripping hazard, cover interconnecting cables or place them out of the way • Prevent overloading circuits by using surge protector(s)/master switch to connect electronic equipment, such as computers, monitors, printers and fax machines • Position equipment close to electrical outlets • Ground all electrical outlets

Initials	Security of Information and Equipment
	Employees must prevent costly computer breakdowns and the loss of crucial data by following these computer safeguards:

Initials		
	Protecting Information, Data and Equipment	Comply with the County's Portable Computing Policy, the Countywide Information Technology Standards, the County Internet Policy, and the County Ergonomics Policy for Computer Operations. • All teleworking supplies and equipment are maintained in good condition. • Position equipment away from direct sunlight or heat sources. • Place equipment on well-ventilated surfaces and provide for sufficient air space around them. • Ensure a clean, dry space for storage of external hard drives, USB's and other portable storage devises.
	Safety	Power down equipment at the end of a workday. • Ensure all county issued equipment, software and supplies are kept safe and secure from unauthorized use, and protected again from theft, loss and damage. • Comply with Information Technology Standards by using passwords.
	Confidentiality	All confidential, private, personal or privileged records or information are kept safe and secure to the greatest extent possible and according to the security measures and safeguards.

Initials	Work Related Injury While Teleworking

	Reporting a Telework Injury	If a teleworker is injured in his/her designated teleworking workspace during teleworking hours while conducting County business, the teleworker must notify his/her supervisor immediately and follow County policy for reporting on-the-job work injuries. If the immediate supervisor is not available, the teleworker is to contact the manager or an alternate supervisor or manager for reporting the injury. The supervisor is to follow all applicable rules and procedures governing employee injuries (e.g. fill out appropriate forms, such as "Report of Incident or Unsafe Condition" and escalate information as needed).
	Worker's Compensation	Injuries occurring while teleworking may be covered by Worker's Compensation provided that all eligibility requirements are met. Existing policies for Worker's Compensation apply.
	Outside of workspace and outside parties	The County assumes no liability for injuries to the employee/teleworker that occur outside of the designated telework space and outside of employee's scheduled telework hours. Employees are liable for injuries to third parties who enter the designated work space.

Initials	Automobile Safety

	Automobile Safety	Employees who operate County vehicles must have a valid operator's license and authorization from Risk Management and must comply with the County Driving Policy and Safe Driving Program.

Certification

I certify that I have read and understand the components of a Safe and Effective Telework Environment and am aware of how the requirements create a healthy, safe, and effective telework space. I agree to uphold the terms and specifications outlined above.

I understand that my supervisor or department may deny my opportunity to telework or may rescind my existing Telework Agreement for non-compliance with these terms or any safety problems or injuries in the telework space.

Employee Name : _____

Employee Signature:_____ Date:_____

Supervisor/Manager Name: _____

Supervisor/Manager Signature: _____ Date:_____

For Employees

Tips for Planning Your Telework Day

Following are some practical tips for making sure your telework days are productive:

Plan Ahead

- Identify what specific projects/tasks you'll be working on when you telework.

- Take more work with you than you think you'll be able to finish (twice as much is a good rule of thumb).

- Keep deadlines with manager, coworkers, and others - communicate progress and delays.

- Be prepared for technology "glitches." Have non-computer dependent work with you, if at all possible.

Get Organized

- Establish a routine similar to your regular workday, just without the commute.

- Use a "To-Do List" for task you hope to accomplish for the day and check of those completed.

- Keep your home office supplied with the things you'll need (phone numbers, resource materials, and office supplies) to avoid creating additional work for others in the office.

Avoid Procrastination

- Set deadlines for yourself, ahead of the "real" deadlines for others.

- Tackle difficult task during your "peak" hours, when you are most productive.

- Break large projects down into discreet tasks.

Resist Overworking

- Take regular, brief breaks throughout the day. A good rule of thumb is to block out two to five minutes to get up and move around for every 60 to 90 minutes of work. It is also recommended that you leave your work area when you take a lunch break rather than continuing to sit at the computer.

- Turn the computer off at the end of the workday.

- Overworking on a regular basis does not necessarily make you more productive!

Handle Possible Distractions

- Family Members
- Neighbors
- Chores
- Pets
- Weather

- Television
- The Refrigerator
- Social Media
- Know your "triggers" and set ground rules with others, if need be.

Work Planning & Communication Tool

Use – These tools can be used to provide consistent, timely, and reliable communication between the teleworker and his or her supervisor about work-related expectations when the employee is teleworking. This can be especially useful when an employee first begins teleworking to establish "trust" between the employee and his or her manager, especially if the manager is not totally comfortable with teleworking.

SAMPLE 1: At the end of each week (e.g., Thursday or Friday), the teleworker emails the Work Planning Schedule for the coming week to the supervisor and provides feedback on what was accomplished that week. This should take no more than 5-10 minutes to complete.

Work Planning Schedule For The Week Of [DATE]							
	Mon	**Tue**	**Wed**	**Thur**	**Fri**	**Sat**	**Sun**
Date							
Work Site							
Meetings, Travel, etc.							
Meetings, Travel, etc.							
Scheduled Tasks							

Status Report For the Week Of [DATE]				
Scheduled Tasks	**Deliverables/Desired Outcomes**	**Status**	**Issues/Barriers Encountered**	**Corrective Action Taken**

SAMPLE 2: Alternatively, the employee and supervisor may decide to use this tool only on telework days using the sample emails below:

Prior to employee's twelework day...

    This is a reminder that I will be teleworking on [DATE]. Following are the things I will be working on:

• **List major tasks to be accomplished**

    As always, I can be reached on [phone number and email address].

At the end of the telework day or upon returning to the office...

    Here is an updated on what was accomplished on my telework day:

• **Provide brief description of what was accomplished. Attached drafts/final documents as appropriate.**

    Please let me know if you have any questions.

For Supervisors

Individual Consultation Questions

County of San Mateo Telework and Alternative Work Schedule Program

Individual Consultation – Discussion Questions

Name:	
Title:	
Department:	
Email:	
Phone:	
Date/Time of Consult:	

• Does your department/division/office have a formal or informal telework program?

• What problems or concerns do you have about teleworking? What has been an issue for you?

• What problems or concerns do you have about AWS schedules?

• Have you ever had to deny or terminate a telework arrangement? If so, what were the circumstances that led you to that decision?

• Have you ever let anyone telework who you were not sure about? What was the result?

• Why do you think participation in telework has been so low?

• Do you telework? If so, how has it worked for you? If not, why?

- What specific aspects of the telework arrangement have been the most difficult to manage and why? What has not worked well?

- Is the County's IT infrastructure/support adequate to support employees working remotely? If not, what needs to be improved?

- What tools would make teleworking more successful (e.g. video, instant messaging, other social media)?

- Are the County's Telecommuting Policies and Procedures adequate? If not, how could they be improved?

- What would you like to see covered in training for employees? For supervisors and managers?

- If implemented properly, how do you think teleworking could benefit the County?

- What are the biggest challenges facing the County over the next 5 years?

- What is the downside/risk from not utilizing telework?

- What are your suggestions for improving the County's telework and/or AWS programs?

Approval and Monitoring Tips for Supervisors

Things to think about when considering telework approval:

1. What are the employee's reasons for requesting telework? Are these reasons going to set the employee up for success or failure?

   a. If an employee wants to telework because he/she needs to be home to take care of a child or family member, the employee may not be able to meet the availability requirements of the telework arrangement.

2. What are your reasons for supporting telework?

   a. Is the employee disorganized and very busy and you think telework will help him/her focus? If so, explore options for helping that employee manage his/her workload before suggesting telework. Telework is a reward for exceptional performance, not a tool for improving performance.

   b. Is the employee overworked and you think teleworking will allow him/her to work more hours? If the employee is management, this may be a good reason. If the employee is not exempt, this isn't a good reason. Work with the employee to determine a manageable workload and then explore telework options.

3. Does the employee want to telework to allow for a more flexible schedule? For example: Maybe the employee wants to work early in the morning with a long break in the middle of the day, and then again in the evening. If this doesn't interfere with expectations around availability, this may be fine. But the schedule should be formalized in the DOCUMENT agreement so that you and the employee have a shared schedule expectation.

4. Is the employee a supervisor?

   a. Have you considered the autonomy with which his/her staff are able to work? Supervision is a part of a supervisors job, telework must be considered in relationship to these responsibilities, too.

Things to think about when monitoring telework use:

Telework is not a way of reducing use of sick leave or vacation leave.

If an employee is sick on a telework day, he/she should use sick-leave.

Telework is approved for a consistent alternative location only. If an employee is teleworking from another location (e.g. when traveling) this should be approved by you in advance and should not alter his/her work hours.

Are there ways in which technology can assist an employee in being successful at teleworking?

Think creatively about ways that HPP can support employees in teleworking and bring suggestions to HPP Leadership. The IT world is always changing and we should always be exploring how we can better support our teleworking staff.

Have you noticed a productivity DECLINE during telework days? Since beginning teleworking?

If you are concerned about productivity you can institute a reporting mechanism that requires staff to report back to you on telework day activities. Set clear and measurable productivity standards and track whether telework employees are meeting these. You do a disservice to your staff if you do not address performance issues early.

Have you noticed a productivity INCREASE during telework days? Since beginning teleworking?

If you notice staff are more productive as a result of teleworking, consider how you can facilitate teleworking for other staff. Acknowledge the staff who are increasing productivity.

Have you noticed reduced communications during telework days?

Do you not hear from staff as readily as when he/she is in the office? If communications has declined, remind staff that an expectation of teleworking is keeping communications the same as working in the office.

How to Manage for Results/Performance/Accountability

Supervising teleworkers may appear challenging at first but, in reality, most supervisors are already managing employees they do not see. Today's workforce is becoming more and more mobile and employees are rarely in the office and at their desks eight hours a day, five days a week. Actual occupancy of commercial office space in the U.S. between the hours of 8:00 a.m. and 5:00 p.m. is 30-50%. As noted below, teleworkers are just part of the continuum of the mobile workforce:

- **Office Bound Employees** – Employees who must be in the office all day, every day to perform necessary functions, such as greeting the public or answering the phone.

- **After-Hours Workers** – Employees who work at home nights, weekends, and holidays.

- **Teleworkers** – Employees who work at home or other approved location during normal business hours.

- **Mobile Workers** – Employees equipped to work where ever they may be.

- **Remote Workers** – Employees who work outside of the traditional office 100% of the time, often from geographically distant locations. These employees may report to the main office once a month or once a quarter.

In practice, managing employees when they are out of the office should be no different than when they are in the office. Managers need to clearly communicate expectation and employees need to be accountable for results. Following are some best practices for managing teleworkers.

Set Expectations

It is important to set clear expectations with employees about the telework arrangement. This includes keeping you, the supervisor, informed about their schedule and what they will be working on when teleworking, maintaining an adequate level of communication with others, and being accountable for getting their work done.

Encourage employees to use the Work Planning and Communication Tool (see Section 9) to help them plan and organize their telework days and keep you informed. This simple tool can go a long way in creating good communication habits and fostering trust between the employee and the supervisor. Many supervisors quickly realize they know more about what their teleworkers are doing than other employees in the office.

Communicate, Communicate, Communicate

Just because teleworkers are not in the office does not mean they are not accessible. Learn to replace face-to-face interaction with other forms of communication such as email, instant messaging, texting, and video calls. Consider using shared calendars for all employees so team members know where everyone will be working from on any given day and how they can be reached.

Avoid Micromanaging

While communication is important, micromanaging can be counterproductive. Constant check-ins and rigid monitoring of employees' daily activities can erode trust, dampen morale, and hinder productivity.

Manage by Results, Not Physical Presence

Do not equate physical presence with productivity. Rather, work with employees to establish clear work-related goals and agreed upon performance metrics to ensure long-term success while teleworking. If employees fall short of your expectations in any area, act promptly and work with them to improve to improve their performance. Be specific about what they need to change.

Require Training

Training is one of the most important, but often overlooked, elements of a formal telework program. Sending employees home and letting them figure things out on their own is not a good approach. Employees and supervisors both benefit from telework training to ensure everyone understands the organization's telework policy, the critical success factors for teleworking, and the manager's role in a remote work environment. See Sections 8 and 10 for information on free, online telework training available through San Mateo County.

Handle Performance Issues Promptly

Most employees will work hard to make sure the telework arrangement is successful. However, if you do encounter performance problems with a particular teleworker, work with your Human Resources representative to try to resolve the issue promptly. Do not let the situation linger as this sets a bad example for other employees. If you are unable to resolve the issue with the employee, you can terminate the agreement. (The organization's telework policy should include provisions for terminating the telework agreement, either by the organization or the employee.)

In practice, it is usually the employee who decides to terminate the telework arrangement, rather than the organization. Some employees find teleworking is just not for them. The two most common reasons employees decide to quit teleworking are feeling too isolated and preferring to maintain a clear distinction between work and home.

Helpful Handouts

Mileage Calculator

Mileage is based on travel to and from your work site and the off site location. If you are traveling to the off site location from your home, your claimable mileage is the lesser of either:

1) The distance between work site to off site location **or**

2) The distance between home to off site location.

Example 1

Work Site to Off Site location: 10 miles

Home to Off Site location: 15 miles

Claimable Mileage: 10 miles (20 miles total round-trip)

Example 2

Work Site to Off Site location: 10 miles

Home to Off Site location: 5 miles

Claimable Mileage: 5 miles (10 miles total round-trip)

This applies to required travel on normal working days and non-working days. If you are scheduled to telework on a given day and are required to be present at your work site, mileage reimbursement does not apply.

The reimbursement for mileage is calculated as follows: **total miles x reimbursement rate**

Current mileage reimbursement rate as of 7/1/12: **$0.555/mile**

Claimable related travel expenses

- **Parking Fee**
- **Tolls**

Unclaimable related travel expenses

- **Parking tickets**
- **Driving tickets**

How to Block a Phone Number

Quick Tip: Dial *67 before the phone number you are dialing to block your phone number one time.

Blocking Your Cell Phone Number Temporarily:

Sometimes you may want to block your number from caller ID for a specific call. You might not want someone to know that you are trying to reach them for the 15th time in a row, or you might be calling a business and might not want them to know your number. Whatever the reason, it's easy to do.

1. If you want to block your number on a call-by-call basis you need to dial *67 before dialing the number. Ex *67 (555) 555-5555.

2. When you do this you will not have any feedback that it worked. If you want to test it, just call your home phone, or anther phone that has a caller ID from your cell to confirm that the block worked.

One important thing to remember is that your number will not be blocked from emergency services or any toll-free number - it only works when you call businesses and individuals.

Blocking Your Cell Phone Number Permanently:

The most permanent solution is to request a "line block" from your cell carrier.

1. To do this you simply need to call the customer service for your specific provider and they can block your number. When you do this your number will never show up to anyone.

2. To call your wireless customer service to block your number, just dial 611 from your cell phone and you will reach them.

3. If there is a situation where you want your number to show up, you will still have an option. When you have a permanent block on your number you will need to dial *82 before dialing the number you are calling. When you do this your phone number will show up just once for that specific call. (Ex: *82 (555) 555-5555.)

How to Map Shared Drives

If you are working offsite, log into your VPN first and follow the steps below.

1. .Go to: My Computer

2. In the Tools menu, choose Map Network Drive

3. In Drive, select a drive letter

4. In Folder, type in: Drive Name and location, i.e. \\server\share

Monitoring and Evaluation

Overview

Setting up a way to track telework hours and Alternate Work Schedules allows for greater analysis of employee participation and estimation of greenhouse gas reductions. The County created a unique code to signify time spent teleworking for employees to enter while inputting their hours for payroll. This timecode allowed the County to query the number of teleworkers, compare telework participation by department, compare telework participation over time, and see increases and decreases in hours spent teleworking. Ensuring all teleworking employees know about and use the code will make greenhouse gas estimates more accurate.

In addition, pre and post implementation surveys and focus groups can help capture additional feedback. In the absence of a timecode, surveys can help capture participation rates and gather employee commute information needed to estimate reductions in greenhouse gas emissions. Focus groups can help gather more in depth information on attitudes toward Alternate Work Schedules, successes, and areas that need improvement.

How to Evaluate a Program's Success

Managers can use a number of tools to help them gauge how a telework or flex-schedule program is working. Below are some options that can be used on their own or in combination.

Timecodes

Building a unique timecode into your payroll system allows you to easily track participation rates by department, division, or time period. Payroll specialists and staff will need to be trained to use the code to accurately record their hours, and hours are likely to be underreported. However, not all payroll systems will allow this.

Surveys

Employee surveys can be conducted before and after a telework program is implemented to help capture attitudes towards telework, changes in communication or team dynamics, responsiveness rates, and more. Results can be used to identify issues to focus on and ways to fine-tune a program.

If a timecode in your payroll system is not possible, surveys can also be used to help track yearly participation rates in telework programs.

Surveys can also be used to track how telework contributes to a reduction in greenhouse gases. 511.org offers employee surveys for employers. Using survey data, companies and agencies can design an effective transportation program and greener worksite. For more information, contact the team member for your county.

Focus groups

Focus groups can be held with teleworkers and non-teleworkers, as well as supervisors/managers and employees. This tool may provide more in-depth information than a survey.

Group meetings

Regular staff meetings or leadership meetings are another place to gather feedback on the program, identify issues, and consider next steps. Not everyone may feel comfortable giving feedback in a group setting.

Focus Group Materials

Focus group recruitment sample email

Below is a sample email that can be used for recruiting participants.

The County is interested in increasing employee participation in its telework and alterative work schedule programs. The Human Resources Department will be conducting several focus groups on DATES with employees who participate in telework and AWS programs, supervisors and managers, and non-teleworkers. The purpose is to get your feedback about these programs so we can determine what is working well and to identify any issues, so we can make improvements and adjustments to these programs, as necessary.

The focus group sessions will be held on the following dates, times, and locations:

- **[Group Name]: TIME on DATE at [location]**

- **[Group Name]: TIME on DATE at [location]**

- **[Group Name]: TIME on DATE at [location]**

To participate in one of these sessions, please contact [name] at [phone/email] by DEADLINE. Thank you for your interest in helping us evaluate and improve the County's telework and AWS programs.

[Name/Title of HR Representative]

County of San Mateo Focus Group Guide for Non-teleworkers (Allow 90 minutes)

Date:	
Time:	
Location:	
Number of Participants:	

Introduction

- The County is interested in increasing employee participation in its telework and alterative work schedule programs.

- We are conducting several focus groups with participants in telework and AWS programs, supervisors and managers, and non-teleworkers to get feedback about these programs.

- The purpose it to see what's working well and to identify any issues, so the County can make improvements and adjustments, as necessary.

- This is an informal process – I'll be asking a few questions about your experiences.

- Responses are confidential and nothing will be attributed to anyone.

- There are no right or wrong answers – your candid responses are appreciated!

- If there is something you want to share with me but don't feel comfortable doing so in a group setting, please contact me directly.

Any questions? If not, let's get started…I'm going to start by asking you a few questions about the AWS programs (define if necessary) and then move on to some telework-related questions.

AWS Programs

1. Do many of the employees you work with participate in AWS programs?

2. Does this have any impact on your ability to work together as a team?

3. Have there been any problems with the use of AWS programs in your office/division? Is so, what were they and how were they resolved?

Telework Program

Participation and Frequency

4. How many of your coworkers telework?

5. On average, how often do they telework?

6. Are you interested in teleworking? If so, why aren't you doing so?

Coworker Attitudes

7. Overall, how well do you think the County's telework program is working?

8. What is working well?

9. What could be improved?

Communication

10. Do you know when your coworkers are teleworking?

11. Do you know how to reach your coworkers when they are teleworking?

12. Are your reluctant to contact your coworkers when they are teleworking?

13. Have you encountered any problems reaching your coworkers when they are teleworking?

Workload

14. How has teleworking affected your ability to do your job/get your work done? Has it created more work for you?

Management Support and Team Dynamics

15. Do you think supervisors and managers are supportive of teleworking?

16. Does your office/division work as a team, or do people tend to work independently?

17. How has teleworking affected your office/divisions ability to work together as a team?

Organizational Benefits

18. How do you think teleworking and AWS impacts the County overall? Is it good for the organization? Does it benefit customers, the environment? If so, how?

Recommendations

19. Do you have any other comments or suggestions that would be helpful in improving the County's telework or AWS programs?

County of San Mateo Focus Group Guide for Telework & AWS Participants (Allow 2 hours)

Date:	
Time:	
Location:	
Number of Participants:	

Introduction

- The County is interested in increasing employee participation in its telework and alterative work schedule programs.

- We are conducting several focus groups with participants in telework and AWS programs, supervisors and managers, and non-teleworkers to get feedback about these programs.

- The purpose it to see what's working well and to identify any issues, so the County can make improvements and adjustments, as necessary.

- This is an informal process – I'll be asking a few questions about your experiences.

- Responses are confidential and nothing will be attributed to anyone.

- There are no right or wrong answers – your candid responses are appreciated!

- If there is something you want to share with me but don't feel comfortable doing so in a group setting, please contact me directly.

Any questions? If not, let's get started…I'm going to start by asking you a few questions about the AWS programs (define if necessary) and then move on to some telework-related questions.

AWS Programs

1. How long have you been working on an AWS schedule?

2. What do you like about it?

3. Is there anything you don't like?

4. Have there been any problems with AWS that you are aware of? If so, how were they handled?

Telework Program

Participation and Frequency

4. How long have you been teleworking?

5. On average, how many days per week do you telework?

6. Do you usually get to telework on your scheduled telework days?

Teleworkers Attitudes

7. What do you like about working at home?

8. What don't you like? What have been some of the drawbacks? (Probe if necessary….relationships with coworkers, family members, neighbors…getting motivated/procrastination…working too much…not being able to separate work and home….technology challenges/issues…feeling isolated).

9. How has teleworking affected your ability to do your job/get your work done?

Home Office

10. Where do you telework from…home or someplace else?

11. Describe your home office…spare room, basement, etc?

12. How would you compare your home office environment to your office environment at work?

13. Are there other household members at home? Are they supportive of teleworking? Have there been any issues or problems?

Communication

14. How do you communicate with others when you are teleworking? Are phones forwarded, can you access your email remotely?

15. How has teleworking affected the way you communicate with others…your supervisor, coworkers, customers, etc?

16. Have you encountered any problems communicating with others…for example, have coworkers been reluctant to contact you? If so, what steps you have taken to encourage others to contact you at home?

Equipment/Remote Access

17. Do you use your own equipment for teleworking?

18. Is the equipment adequate for your needs?

19. Have there been any technology issues with the equipment you use and/or remote access? If so, how were they handled?

Coworkers/Managers

20. Are your managers and coworkers supportive of teleworking? If so, how? If not, what do you think could/ should be done to increase support from coworkers and managers?

21. If you were to give advice to a coworker who was about to start teleworking, what would it be?

Organizational Benefits

22. How do you think teleworking and AWS impacts the County overall? Is it good for the organization? Does it benefit customers, the environment…? If so, how?

23. On a scale of 1 to 10, with 10 being "extremely important" how important to you is the ability to telework or participate in AWS?

Recommendations

24. Do you have any other comments or suggestions that would be helpful in improving the County's telework and AWS programs?

County of San Mateo Focus Group Guide for Supervisors & Managers (Allow 2 hours)

Date:	
Time:	
Location:	
Number of Participants:	

Introduction

• The County is interested in increasing employee participation in its telework and alterative work schedule programs.

• We are conducting several focus groups with participants in telework and AWS programs, supervisors and managers, and non-teleworkers to get feedback about these programs.

• The purpose it to see what's working well and to identify any issues, so the County can make improvements and adjustments, as necessary.

• This is an informal process – I'll be asking a few questions about your experiences.

• Responses are confidential and nothing will be attributed to anyone.

• There are no right or wrong answers – your candid responses are appreciated!

• If there is something you want to share with me but don't feel comfortable doing so in a group setting, please contact me directly.

Any questions? If not, let's get started…I'm going to start by asking you a few questions about the AWS programs (define if necessary) and then move on to some telework-related questions.

AWS Programs

1. How many of your employees participate in AWS programs?

2. How has this impacted your office/division?

3. What problems have you experienced with AWS programs?

4. What benefits does AWS provide?

Participation and Frequency

1. How many of your employees are teleworking?

2. On average, how frequently do they work at home?

3. Do you telework? Please describe your experiences.

Attitudes

4. What is your overall impression with how the telework program is working?

5. Do you have any specific concerns or issues about teleworking?

Communication

6. Do you know when your employees are teleworking and how to reach them?

7. Have you had any difficulty reaching employees when they are teleworking?

8. Are you aware of other coworkers or customers who have had a problem reaching employees when they are teleworking?

9. Is the level/amount of communication between you and your teleworkers sufficient to keep you informed of what they are doing?

10. What suggestions do you have for improving the communication between a teleworker and others in the office?

11. How has teleworking affected your employees' ability to work as a team?

Performance and Training

12. Have you seen a change in the performance or productivity of any of your employees who telework? If so, please describe.

13. Has anything changed in the way you manage teleworkers or measure their performance?

14. Has teleworking affected your ability to perform your job? Has it made your job easier or harder? Describe....

15. What areas do you need more information or training on?

Organizational Benefits

16. How does teleworking and AWS benefit the County... its customers...the community...the environment?

Recommendations

17. Do you have any other comments or suggestions that would be useful for improving the telework or AWS programs?

10. Additional Resources

Alternate work schedules have been implemented in the public, private, and non-profit sectors and in a number of states. Many of these programs have developed tools and resources, as well as case studies.

Federal Government

The Federal Government's online Telework website has information for employees and managers here:

http://www.telework.gov/.

Online training for both employees and managers is available here:

http://www.telework.gov/tools_and_resources/training/index.aspx

The U.S. Department of Labor's Workplace Flexibility Toolkit has case studies, factsheets, and more for time and place based flexible workplaces:

http://www.dol.gov/odep/workplaceflexibility/index.htm

State of California

The State of California Department of General Service's Telework website links to statewide policies and guidelines; sample departmental policies; and federal and state resources:

http://www.dgs.ca.gov/dgs/ProgramsServices/telework.aspx

State of Arizona

Virtual Office Implementation Toolkit from the State of Arizona: The toolkit is a combination of checklists, resources, and tools to help other agencies easily adopt the Virtual Office model:

http://teleworkarizona.com/vo/toolkit.htm

- Virtual Office Policies
- Virtual Office Agreement
- Organizational Readiness Assessment Questionnaire
- Virtual Office Job Analysis Checklist

- Do's and Don'ts for Virtual Office Workers and Supervisors
- Safety Guidelines for the Home Workspace
- Equipment Checkout Form
- Virtual Worker and Supervisor Training Guide
- Sample surveys for pilot program participants and non-participants

Telework!VA

Telework!VA is often cited as a case study of a successful telework program. It was launched by the Department of Rail and Public Transportation to help ease traffic congestion. Virginia also offers a business tax credit for telework. This site includes resources for teleworks, managers, online E-learning tools, and more. The Resources section has an extensive list of tools that can be used when implementing telework.

http://www.teleworkva.org/

In addition, the website has a list of success stories and testimonials from companies that have implemented telework.

http://www.teleworkva.org/whatIsTelework/successStories.aspx

Santa Clara County

Santa Clara County's Telework Information Website has links to their program policy, schedule participation form, equipment signout form, workspace checklist, 511 trip diary, and workers compensation procedures.

http://www.sccgov.org/sites/esa/departments_and_programs/labor_relations/Pages/telework.aspx

In addition, this PowerPoint presentation includes more information on Santa Clara County's telework and

Alternate Work Schedule programs.

http://www.sccgov.org/sites/esa/departments_and_programs/labor_relations/Documents/CEMA/PDF%20of%20CEMA_v7.pdf

Online Training

Telework!VA:
http://www.teleworkva.org/

Federal Government:
http://www.telework.gov/tools_and_resources/training/index.aspx

The Benefits of Telecommuting

http://icma.org/en/icma/newsroom/highlights/Article/102815/Benefits_of_Telecommuting

- **Author:** ICMA (International City/County Management Association)

- **Description:** This short online article links to Las Vegas, Nevada's telecommuting policy; Austin, Texas' telework program overview; a guide for telecommuters put out by the city of Mercer Island, Washington; and more.