



TELEWORK: GOOD REASONS & GREAT TOOLS

**a WORKSHOP TO HELP YOUR ORGANIZATION
GET STARTED WITH TELEWORK**



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Commuter Challenge is a non-profit organization that has been fostering public/private partnerships to find solutions to our region's transportation issues for over 15 years. We work to improve regional mobility and protect and sustain the environment in the Puget Sound region by:

- Collaborating with public agencies to provide information, technical assistance, and incentives to employers and employees to help reduce the number of vehicles on the road;
- Working with public and private entities to develop and implement innovative programs to encourage changes in individual behavior; and
- Proposing and supporting policies that offer real solutions to transportation problems.

Our partners include: King County Metro Transit; City of Seattle; Washington State Department of Transportation; enterpriseSeattle; East King County cities of Bellevue, Issaquah, Kirkland, Mercer Island, and Redmond; Greater Redmond Transportation Management Association; Puget Sound Clean Air Agency; Puget Sound Regional Council; South King County cities of Algona, Burien, Des Moines, Enumclaw, Federal Way, Kent, SeaTac and Tukwila.

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Section 1: Overview

The truth is that many businesses benefit when the right employees telework. It's also true that telework—working from home or a location other than the primary place of business—isn't for every job or every employee.

This workbook, as part of the “Telework: Good Reasons & Great Tools” workshop, will help you weigh the advantages and appropriateness of telework for your organization and learn more about what it takes to get a successful program started. It also will help you make your business case to management about how and why telework can benefit your company.

In many circumstances, telework can improve employee productivity and retention, help recruit top-notch employees, extend customer service hours, aid in emergency preparedness, and even save your business money. And, it's a great way to help employees avoid the stress and high cost of driving to work every day.

Some employees who telework do so only occasionally. Others work from home or a satellite location almost every day. Telework is extremely flexible and can be used at your company in any way that best suits your business needs.

You owe it to your business, your bottom line, and your employees to find out if telework is a good fit for your company.



Section 2: How hard is this going to be?

Telework – the simple definition:

Telework (also known as telecommuting) is an employee working some place other than the traditional workplace. Another way to think of this is that telework brings the job to the person rather than taking the person to the job.

Telework can be as simple as grabbing a book and notepad to head home for some uninterrupted reading time—or as sophisticated as setting up a network of customer service representatives who work at remote locations full time. Your business needs will determine how you approach telework at your organization.

Working with someone we can't see is nothing new. Every day employees at most organizations work over the phone or by email with:

- Customers and clients
- Co-workers at branch offices
- Management at corporate headquarters
- Project collaborators at other organizations
- Consultants doing project work
- Suppliers of goods and services

And, according to recent research:

- “One-half of U.S. employees in mid-size and large companies have work arrangements that define them as ‘off-site’ workers.”¹
- An impressive 83% of full-time employees in companies with 500 employees or more say that they work off-site and/or interact with someone who works at a distance at least once a week.²

¹ WFD Consulting, *When the Workplace is Many Places: The Extent and Nature of Off-Site Work Today*, Watertown, MA, 2001-2002, p. 7.

² *Ibid.*, p. 10.

Telework – the reality:

In practice, telework encompasses many different types of work arrangements:

- **Frequency** can range from occasionally to every day.
- **Schedules** can be fixed or flexible.
- **Locations** can be at home, satellite offices, or even customer locations.
- **Structure** can be ad hoc or formalized (i.e., with written policy and procedures, as well as designated budgets).
- **Equipment** needs and investment can be minimal or extensive.
- **Training** for managers and teleworkers may or may not be offered.

Teleworkers who worked at home during business hours at least one day a month grew to 24.1 million in 2004, representing 18.3 percent of employed adult Americans or nearly one-fifth of the workforce.³ By 2007, this number is expected to rise to a third of the workforce.

In general, research shows that telework programs that have the best chance of succeeding offer structure, adequate funding for equipment and support services, training for teleworkers and managers, and the accompanying aura of organizational legitimacy these components provide. Formal programs, and the planning and evaluation processes they include, also are most likely to contribute to corporate goals such as saving money by reducing the need for office space and parking, as well as productivity and employee retention goals listed on the following page. And, formal pilot programs generally offer better “scalability” that allows them to be expanded to more extensive telework programs.

According to the International Telework Association and Council, “By including a process whereby management can measure and quantify productivity, the improvements can be translated into real savings. Without such a plan, it may be more difficult to quantify productivity improvements in relation to the bottom line.”⁴

Of workers who work from home, the most common are ad hoc teleworkers (15%) who work from home an average of 2 days per month.⁵

On the other hand, some companies—often including smaller ones—prefer to allow telework on an informal or “ad hoc” basis in order to test the concept or because they choose to continue informally at the

discretion of individual managers. If this approach is adopted at your company, be sure to revisit your corporate goals periodically to see if a more formalized approach would provide greater benefits for your organization. While an ad hoc program is easiest to get started, it may not yield the long-term and documented advantages of a formal program.

³ International Telework Association and Council, “Work at Home Grows in Past Year by 7.5%”, Silver Spring, MD, Sept. 2, 2004.
⁴ International Telework Association and Council, “e-Work Guide: How to Make Telework Work for Your Organization,” Washington, D.C., 2000, pg. 15.



The business case for telework:

- Lower turnover due to better employee satisfaction
- Better ability to attract top-notch employees
- Improved productivity
- Better quality of work
- Less sick leave taken; reduced absenteeism
- Improved ability for business to function during an emergency
- Reduced need for office space and parking
- Access to untapped labor markets (part-time, people with disabilities, semi-retired, geographically distant)
- Ability to deal with construction-related disruptions (e.g., transportation projects affecting major thoroughfares; building construction and remodeling)
- Improved regional mobility by taking cars off the road
- Cleaner air and environment

Grants, financial incentives, and implementation assistance may be available to your organization to make telework even more attractive to your organization. See Section 8 of this workbook for more information.

When organizations offer telework, they convey important information about what they represent as an employer:

- Respect for employees as individuals
- Support for employees' balance of work and life responsibilities
- Creativity in finding solutions to fit our changing economy and world
- Willingness to make business decisions with people in mind
- Equitable treatment and evaluation of employees based on what they produce, not when and where they produce it

⁵ WFD Consulting, *op. cit.*, p. 8.



Why employees value telework:

- Better work/life balance
- Increased job satisfaction
- Ability to work independently
- Greater flexibility in their work schedule
- Recognition of being valued and trusted
- Less stress and “lost time” associated with commuting
- Lower commuting costs
- Fewer interruptions during the workday
- Change of pace that fosters creativity and productivity



Employee Commitment: One great telework benefit

A research study completed in 2002 by WFD Consulting surveyed 1,948 full-time U.S. employees of for-profit companies of 500 or more employees in order to measure commitment to their employers. The study found that responses from ad hoc and regular teleworkers were more positive than on-site workers in every category studied.⁶

Employee Commitment

Percentage of Respondents Who “Agree” or “Strongly Agree”

BASE:	On-site workers	Ad Hoc teleworker	Regular teleworker
I am satisfied with my job.	55	76	73
I would choose to work here again.	63	75	78
I feel very loyal to my company.	61	66	73
I recommend my company as a good place to work.	59	73	62
I go the extra mile to help meet business needs.	83	92	93
I work extra hours when needed to help the company succeed.	78	88	93
My personal values are consistent with the company's values.	49	61	64
Commitment Index	3.7	3.9	4.0

The survey included a validated scale comprised of 7 items that measure employee effort, identification and attachment to the organization. According to the research study, employee commitment has been shown to correlate strongly with productivity, discretionary effort, and retention. The table above has been adapted from the original material.

Although the study found weaknesses in the majority of current telework arrangements, such as failures to provide guidelines, central sources of information, or training for managers and employees involved in off-site work, it concluded that:

“Even with this modest level of attention to the challenges of virtual workplaces and distance teaming, off-site work is working amazingly well... Good fundamental management practices are key to off-site effectiveness; thus, an intentional focus on off-site arrangements is likely to have positive ripple effects for management of onsite-workers as well.”⁷

⁶ WFD Consulting, *op. cit.*, p. 24.

⁷ WFD Consulting, *op. cit.*, p. 75.



Section 3: Is my company ready to take the plunge?

The following pages introduce ideas to consider as you assess your company's readiness to implement telework. Consider these points and discuss them with key managers.

Organizations most suited for telework...

Take a look at your **corporate culture**. Is your organization competitive, practical, innovative, and adaptable? Ask yourself if your company:

- Sees the link between employee morale and productivity?
- Accepts that telecommuting can improve morale?
- Recognizes the importance of employees' maintaining a work/life balance?
- Places a high value on attracting and retaining top-notch employees?
- Has employees that do not always need to be on site?
- Uses computers and/or telephones for significant portions of your work?
- Has an atmosphere of trust between managers and staff?
- Is willing to provide telecommuters with adequate training, equipment, and IT resources and support?
- Has a culture that invites change in order to be competitive?
- Values new ways of doing business?
- Is empowered by a firm understanding of its business needs?

It's OK if you didn't answer "yes" to every question above. But, if you answered "no" to many of them, it may be an indication that your company is not a good candidate for telework at this time.

Jobs most suited to telework...

Ask yourself if your organization has jobs that:

- Include key tasks that can be accomplished effectively while teleworking?
- Allow work to be transferred to and from the telework location with ease, speed and confidentiality?
- Have manageable requirements for face-to-face contact with managers, colleagues, clients or subordinates?
- Can meet the needs of clients, co-workers and the organization when teleworking?
- Allow meetings to be scheduled on days at the office and usually are not subject to frequent unscheduled meetings requiring face-to-face contact?
- Are usually not required to handle emergency situations?
- Have responsibilities that will benefit from uninterrupted work time?
- Allow the employee to work without equipment, materials, and files that are available only at the workplace?
- Can be accomplished away from the office without impacting organizational security?
- Can be provided with Internet and remote access capability (if required)?

Tasks well-suited to telework...

Analysis
 Auditing
 Budget preparation
 Calculating
 Computer programming
 Conceptual work
 Contract administration
 Creative concept development
 Data entry
 Data base maintenance
 Design work
 Dictating
 Drafting
 Editing
 Email correspondence
 Evaluations
 Graphics
 Internet research
 Planning
 Project management
 Reading
 Record-keeping
 Transcribing dictation
 Telephone contacts
 Thinking
 Word processing
 Writing

The right employees...

- Already are successful at their jobs
- Have a desire to telework
- Know their responsibilities, their organization, its rules and culture, and their colleagues
- Are “self-starters” who work independently and are self-disciplined and responsible
- Are well-organized and results-oriented
- Ignore distractions and focus on the task at hand
- Are flexible and adaptable
- Communicate effectively with managers and co-workers
- Do not have high need for face-to-face social interaction with colleagues
- Are sensitive to the impact telework may have on their co-workers and clients
- Have home or remote work spaces that are safe, quiet, and ergonomically appropriate
- Have home or remote work spaces that are or can be equipped with the work tools they require
- Understand that telework is not a means to be available for child or elder care during working hours
- Do not have issues involving non-performance, lack of trust, or dependency on direct supervision

The “Selection Survey for Employees” available in Section 7 of this workbook, on the workshop CD, or on the website at www.CommuterChallenge.org provides a useful tool to assess the feasibility of teleworking from an employee’s perspective.



The right managers...

- Have good supervisory and communication skills
- Can evaluate performance by results rather than by the clock or 'face time'
- Are pro-active and manage by objectives, not by crisis response
- Believe in the integrity and professionalism of their employees
- Are flexible, adaptable and open to new ideas
- Support telework by their employees
- Recognize the need for employees to balance work with personal life

What does "managing by results" mean?

- **Work objectives** are clearly documented
- **Responsibilities** of the individual and the team are well defined
- **Deadlines** are established and met
- **Interim checkpoints** are set and monitored
- **Regular feedback** on job performance is provided

Productivity = Work quantity + Work quality

The "Selection Survey for Supervisors" available in Section 7 of this workbook, on the workshop CD, or on the website at www.CommuterChallenge.org provides a useful tool to assess the feasibility of teleworking from a supervisor's perspective.



Telework Worksheet (confidential)

Work on this section independently for the next few minutes. You will not be asked to share the information unless you wish to do so. List some positions and tasks in your company that would be good candidates for telework:

A. Position: _____

Tasks: _____

B. Position: _____

Tasks: _____

C. Position: _____

Tasks: _____

D. Position: _____

Tasks: _____

E. Position: _____

Tasks: _____





COMPUTER CHALLENGE

Take a moment to think about and list concerns your management is likely to raise about telework. How might you address these issues? (Don't worry if you don't have all the answers. We will revisit this topic in the next section.)

A. Concern: _____

Response: _____

B. Concern: _____

Response: _____

C. Concern: _____

Response: _____

D. Concern: _____

Response: _____

E. Concern: _____

Response: _____



Section 4: Where do we start?

There are several issues to consider as you begin developing your telework program:

- Which departments and employees will be eligible?
- How will participants be selected?
- How many days each week will participants telework?
- What equipment and support services will be needed and how much will this cost?
- What, if any, training is needed for supervisors and employees to be successful in a telework program?
- Which implementation route will benefit the company more: A small, informal (“ad hoc”) test program or a formal pilot program that can more accurately set corporate goals and measure the success of telework in meeting them?
- What security, safety and risk management issues need to be considered?

These key issues can seem like a lot to think about. But by taking the time to work through these matters up front and plan accordingly, implementation pitfalls can be avoided further down the road. Because telework often requires shifting attitudes, forming new work habits, and establishing new policy and procedures, you may wish to start with a pilot program involving a limited number of employees who telework part time. This will help to ensure that any unanticipated problems can be addressed and remedied prior to a full program rollout.

This section will help you determine which considerations are most critical to your organization’s telework program and offer suggestions about how to find the information and solutions you need. The “Proposal to Management Outline” available in Section 7 of this workbook, on the workshop CD, or on the website at www.CommuterChallenge.org outlines the initial steps that you may need to take to secure management approval for a telework program.

Evaluate your culture and existing policy

Review the list of questions in Section 3 under “Organizations most suited for telework” (page 3-1). It may also be enlightening to review your company’s current employee manual to get a feel for the types of policy and procedures that have already been documented.

Then, think about the following:

- Does your organization have specific business needs that can be addressed through telework?
- Is there someone at a high level in your organization who embraces the value of telework and will mentor and champion it?
- Are there specific measurable objectives that will help you evaluate the success of your telework program? How will you track this information to measure progress?
- What processes, policy and procedures do you need to put in place to implement and support your telework program?
- If telework seems a good fit for your corporate culture, how much time will your organization need to prepare for and implement your program?

Be aware that these are some of the key questions that should be answered as you work through your telework planning process.

Plan for success

To be successful, telework not only should fit well with your organization's corporate culture, but also support its core business objectives. It's important to structure a program that will achieve well-defined, measurable objectives that can demonstrate the productivity and cost-effectiveness of telework for your organization.

A. Weigh costs and benefits

The Work Options Costs and Benefits tool provided on the workshop CD and available for download on the website at www.CommuterChallenge.org can help you determine the viability of telework for your organization. The cost benefit tool will walk you through benefits and business rationale, such as real estate savings, employee effectiveness, and employee recruitment and retention. It also details the costs for administration, training, telecommunications, and equipment. This analysis tool will help you make key decisions concerning your telework program as well as assist you with an annual review of the actual savings and costs.

It is important to keep in mind that these costs will vary depending on the scale of the telework program, the number of days the employee teleworks each week, and the nature of the business, the job, and the agreement between the employee and employer.



B. Set goals

If—after weighing the costs and benefits—you find that a telework program could benefit your organization, think about the specific goals you wish to accomplish. You may want to begin by reviewing the list of company benefits in Section 2, called “The business case for telework” (pg 2-3) to help identify goals that will be meaningful to your organization. Typical goals might include reducing labor turnover; decreasing real estate or parking costs; increasing productivity through uninterrupted time to focus on specific tasks; meeting State Commute Trip Reduction goals; improving customer service; or gaining community recognition.

Use your cost-benefit analysis and your insights into your organization to think about goals for your organization’s telework program and how you will measure success. Here’s an example:

EXAMPLE

GOAL: Reduce labor turnover
 Measurement: Reduce the rate of employee turnover by 15% within two years

Now take a few minutes to identify some goal(s) and measurement(s) that might apply to your telework program. (NOTE: The objective here is to begin to think critically about your company’s business needs, not necessarily to come up with the most strategically sound business reasons for telework without further research.)

GOAL #1: _____

Measurement: _____

GOAL #2: _____

Measurement: _____

GOAL #3: _____

Measurement: _____



C. Secure management support

Before you invest additional time in the planning process, it's important to make sure management supports the telework concept. In small organizations, this may be as simple as walking down the hall to the president's office. In larger companies, you may want to work with someone in your top management team who can be a "champion" for the program.

No matter to whom you're presenting your ideas, it is important to think about your goals, organize your thoughts, and demonstrate that you have done your homework and have the business interests of your company at heart.

Think about the best ways to present your ideas and research. Should you compose a written report, set up a formal presentation, or initiate a fairly informal conversation backed up by data? Be clear on the outcome you are seeking. Do you want approval to take your idea to a higher level within the organization; are you seeking an OK to involve key managers in drafting a formal proposal; or is it reasonable to jump right in with a request to start a pilot program?

What do you know about the person to whom you will be presenting your ideas? Is he or she a "morning" or "afternoon" person? Detail-oriented or focused on the bottom line? Open to ideas from others or more receptive when able to "own" the idea? (This could be the difference between presenting a buttoned-up proposal or starting with a request for input and advice.) Facing a tough deadline or able to focus on what you're saying? Consider all of these things, and more, as you formulate your telework proposal and decide how and when to present it.

A list of common management concerns about telework appears at the end of this section. Reviewing this information will help as you think about how to prepare to present the telework concept at your company.

It's also a good idea to check around to see if anyone within your organization has been teleworking on an informal basis. If they have been doing so successfully, that's an additional piece of information to strengthen your proposal.

Case studies highlighting the programs and accomplishments of other organizations with successful telework programs are available online at www.CommuterChallenge.org. These are a good source of ideas to help you evaluate different types of telework arrangements and to supplement your knowledge about how telework benefits other organizations.

The approval process will be different for every company. This is where you get to apply your institutional knowledge, research, credibility, creativity, and leadership to sell management on the idea that telework will benefit your organization.



Telework concerns

Why are some organizations reluctant to consider telework arrangements? Perhaps the concept of telework makes some organizations uneasy because it requires managers and employees to stretch their comfort zones. Some typical concerns are listed below.

A. Communication – How will teleworkers get in touch and staying informed?

With today’s technology, teleworkers have many good tools for communicating with the office. These range from voice mail to email to pagers and instant messaging. But just as important is the thought you put into making sure that procedures are in place to keep everyone in the communications loop. Write down some ideas regarding specific tools and actions that will help keep your company’s teleworkers “in the loop”:

B. Meetings – How will we schedule time together?

Some companies set regular days/times for meetings to make sure all workers are aware that they need to be in the office. When unexpected meetings are required, teleconferencing offers a good solution for including teleworkers. Jot down some scheduling options that might work for your organization:

C. Workload planning – Will all responsibilities be covered at all times?

Think about the jobs and tasks that you have identified as good candidates for telework. Which responsibilities (e.g., being available to customers, for co-worker questions, or to supervise projects) will need special attention to make sure that they are handled appropriately? Make some notes about how you will ensure these tasks are covered:



D. Technology – What equipment will be needed for teleworkers? How much will it cost and how will funding be secured?

The Work Options Costs and Benefits tool (on the workshop CD or online at www.CommuterChallenge.org) will help you determine what your employees will need and how much this will cost. (For a small, ad hoc test program, it is possible that these needs can be met with existing equipment such as available laptop computers, an employee’s own equipment, or surplus equipment.) As you think about what your company investment will need to be, make sure you consider the return on investment your organization will receive through increased productivity, reduced employee turnover, and other potential savings such as costs for office space and parking. Make note of some of the equipment your telework program will require, and if it is currently available or will need to be purchased:

E. Security – How will company information be protected?

Security is one of the most important issues for many companies considering telework. Are there confidential documents that cannot be removed from the office? If so, your company’s policy should clearly define this. Do teleworkers require online access to your company’s computer system? If the answer is “yes,” you will need support from your Information Technology staff or a qualified consultant to address this issue. Make a note of any security concerns your company may have:

F. Distractions – Will working at home create too many job interruptions?

Most teleworkers report fewer interruptions when working at home than when working at the office. And, according to the American Telecommuting Association, teleworkers have been consistently measured to increase productivity by 10 to 15 percent in nearly every related study over the past two decades. List some steps your organization can take to help your teleworkers make sure that interruptions by family and friends are limited:



G. Goofing off – How will managers know employees are working?

How do managers know that employees are working when they are in the office? Managing by quantity and quality of work is a more accurate measure of productivity than watching an employee to see if he or she looks busy. Write down some productivity measures that would work well for the jobs and tasks you have identified for telework:

H. Career advancement – If an employee is out of sight, is he or she out of mind?

This is a very real concern in some organizations and for some employees but truly is a critical issue only for full-time teleworkers. Note some steps your organization can take to make sure management values its telework force:

I. Adapting – Will a transition period disrupt work flow?

It's likely there will be an adjustment period while teleworkers and their on-site co-workers navigate the early stages of their new work arrangement. However, with good planning and good communication, any disruption can be minimized. It's important to focus on what your organization will gain in productivity and efficiency as telework becomes part of your "normal" work routine. Write down some ideas about steps your organization can take to minimize the initial adjustment period for your employees:





J. Working too much – How will managers know employees are conforming to labor laws?

Teleworkers and their managers need to be aware of state laws that govern overtime and make sure they are not violated. Does your company have policy and procedures in place to address this issue? If not, what steps can your organization take to avoid problems in this area:

K. Insurance, taxes, HR and legal issues – Is this going to get really complicated?

Good planning and involving all departments that will be impacted by telework, from Human Resources to Information Technology to Accounting and Legal/Risk Management, will help to identify issues up front and find solutions before problems occur. List the key players at your company who need to be involved in planning for your telework program:



Section 5: How do we implement our telework program?

You've made it through the initial proposal phase, and you have management approval to proceed with the development of a telework program. Whether your process involves many departments at a large company or just a couple of key employees at a small company, some additional issues you may want to consider before launching a telework program are described below.

The "Sample Teleworker's Assignment" available in the Section 7 of this workbook, on the workshop CD, or on the website at www.CommuterChallenge.org gives you a good tool to employ as you consider the many issues that need to be resolved as you implement your telework program.

Who should be involved?

It's possible that many people will be affected by your telework program, including managers, supervisors, co-workers, and customers. Think about all the areas of your company that have a stake in telework, and get their input.

If you are a medium to large-size organization, a good way to do this is to set up a cross-function steering committee with representatives responsible for human resource issues, information systems and technology, customer service, finance and accounting, insurance and legal issues, and training. (A very small company may not need a formal steering committee, but it is still important to make sure that the individuals responsible for these key areas are consulted.) If your employees are represented by unions, it's important to make sure that their representatives also are involved in the telework planning and implementation process. "Selecting your Steering Committee members" on page 5-5 of this section may help you decide who in your organization would be good candidates for your telework steering committee.

Who will be responsible for implementing and supervising your company's telework program and tracking its progress? You? Another manager? It's important to know who is steering the steering committee.

Remember that executive "champion" you identified in Section 4? Be sure to ask for his or her assistance to enlist steering committee members and to help you make sure that you haven't excluded any important players as you plan the rollout of your telework program. Your champion also will have an ongoing role in keeping top management informed, monitoring performance against corporate goals, and securing appropriate funding.



The following lists highlight some of the most important issues your steering committee members will need to consider as they implement your telework program. Use the blank lines at the end of each list to write down other issues that may be important to your organization.

Helpful forms and agreements for your telework program are available in Section 7 of this workbook, on the workshop CD, or online at www.commuterchallenge.org.

Human Resource issues

- Identify steering committee members
- Select eligible departments, jobs and tasks
- Establish program productivity goals
- Determine how to measure job performance
- Review and comply with any applicable ADA and OSHA requirements
- Set policy and rules for company equipment used for telework
- Ensure information access and security policies are in place
- Write program policy and procedures for work hours, including core hours and overtime, record-keeping, communications, home office expenses (e.g., telephone and high-speed Internet costs), software copyrights, security and confidentiality, safety, family responsibilities such as child care and elder care, etc.
- Create telework forms such as an application and teleworker agreement
- Notify managers and employees about program
- Select telework participants
- Train teleworkers and telework supervisors
- Make sure telework worksites are safe and adequately equipped
- Communicate with and inform managers, co-workers and customers
- Track telework hours; ensure compliance with core hours and overtime limits
- Integrate telework into your organization's Emergency Management/Business Continuity plan
- _____
- _____
- _____





Financial and procurement issues

- Define equipment needs, purchasing procedures, and who will cover expenses
- Manage asset acquisition, tracking and reclamation
- Determine how maintenance, repairs and supplies will be handled and who will cover expenses
- Take lead to set goals for and document financial savings in office space, parking or other resources
- _____
- _____
- _____

Risk management, legal and tax issues

- Clarify insurance issues relating to equipment, injury and liability when employee teleworks
- Resolve real and personal property issues
- Establish procedures to report on-the-job injuries while teleworking
- Establish procedures to report lost or damaged equipment
- Clarify issues relating to tax liability, such as home office
- Protect proprietary information and confidential data
- _____
- _____
- _____

Technology considerations

- Standardization of equipment, networks and software
- Internet access
- Access to computer networks (LAN/CWAN)
- Computer and network security
- Voice mail access
- Installation of equipment and service support



- Sharing equipment with other employees
- Software licensing and copyright issues
- _____
- _____
- _____

Teleworker responsibilities

- Participate in employer-provided training
- Investigate if local laws or community covenants restrict home offices
- Provide adequate home office space
- If appropriate, purchase homeowner’s or renter’s insurance to cover equipment losses, liability for visitors, etc.
- Address any health and safety issues (e.g., use of equipment, ergonomics, etc.)
- Understand tax implications relating to a home office
- _____
- _____
- _____

Information on the following pages will help you through some key steps as you plan and begin to implement your telework program, such as:

- Identifying the most effective members for your steering committee
- Determining whether an ad hoc or formal telework pilot program is a better fit for your organization, and
- Working through a checklist of important milestones to get your program rolling.



Selecting your steering committee members

Many of the qualities that make good telework steering committee members are similar to those that make good telework managers:

- An interest in and support for telework
- Comfortable with managing by results rather than by the clock or “face time”
- Value employees as individuals and see the need for a work/life balance
- See the link between employee morale and productivity
- Have good supervisory and communication skills
- Believe in the integrity and professionalism of their employees
- Are flexible, adaptable and open to new ideas
- Are willing to support teleworkers with adequate training, equipment, and IT resources and support
- Are respected and sought out for advice and expertise within your organization
- Are at a level within the organization that allows them to speak with authority (e.g., manager, key supervisor, etc.)
- Are well-informed about the area of responsibility they will represent on the cross-function steering committee (e.g., human resources, IT, etc.)

Think about possible candidates to represent the various areas of responsibility for your telework steering committee and note their names and qualifications here. One name may appear in more than a single area. For example, in a small or mid-size organization, the human resources and training member may be the same person. (This list is for your own use. You will not be asked to share this information at the workshop.) Don’t forget to work with your telework “champion” as you refine this list and determine how to proceed with obtaining approval to recruit these individuals to your telework steering committee:

Human Resources: _____

Information Technology: _____

Finance / Budget: _____

Training: _____

Risk management / legal: _____

Other: _____



What type of telework program is right for your organization?

Will a low-key ad hoc test program work best for your company, or would your organization benefit from a more formal pilot program that carefully monitors implementation and documents results?

Use the following worksheet to assign priorities to possible goals for your company’s telework program (from 1 “most important” to 3 “least important”). Think about whether your most important goals would best be met by an ad hoc or formal program (check one). Then, note why you think the approach you chose would be most effective in supporting each key goal.

Priority (1 - 3)	Company goals	Ad Hoc	Formal Pilot	WHY?
	Reduce employee turnover			
	Improve ability to recruit top-notch employees			
	Increase staff productivity			
	Elevate quality of work			
	Reduce sick leave/absenteeism			
	Support your company’s emergency management program			
	Reduce need for office space and/or parking			
	Access untapped labor markets (part-time, people with disabilities, geographically distant)			
	Cope with construction disruptions (traffic projects, building remodels, etc.)			
	Contribute to better regional mobility			
	Other			

Based on your analysis in aggregate, do you believe your organization’s business needs will be most effectively supported by an ad hoc test program or a formal pilot program?



Telework Checklist: Steps to get your program rolling

This table outlines some key milestones that apply to most telework programs. The length of time you will need to get your telework program up and running will depend on how informal or formal your program will be. Most formal programs take about six months to implement. If your program will begin as an informal test program, change the column heads to reflect your own implementation schedule.

Task	Month 1: _____	Month 2: _____	Month 3: _____	Month 4: _____	Month 5: _____	Month 6: _____
<input type="checkbox"/> Assess corporate culture						
<input type="checkbox"/> Review jobs/tasks						
<input type="checkbox"/> Weigh costs/benefits						
<input type="checkbox"/> Draft preliminary goals						
<input type="checkbox"/> Enlist management support						
<input type="checkbox"/> Form steering committee						
<input type="checkbox"/> Resolve telework implementation issues						
<input type="checkbox"/> Write policy & procedures						
<input type="checkbox"/> Obtain management OK to proceed						
<input type="checkbox"/> Inform supervisors & employees						
<input type="checkbox"/> Select telework participants						
<input type="checkbox"/> Begin program (or pilot program)						
<input type="checkbox"/> Monitor and adjust, if necessary						
<input type="checkbox"/> Revise policy & procedures, if needed						
<input type="checkbox"/> Evaluate against goals						
<input type="checkbox"/> Expand program, if appropriate						
<input type="checkbox"/> Continue to monitor progress & goals						
<input type="checkbox"/> Adjust, as necessary						



Section 6: Where do we go from here?

There are many additional resources available to help you get your telework program rolling.

Commuter Challenge website

The Commuter Challenge website <http://www.CommuterChallenge.org> - Provides an interactive Cost Benefit Tool, planning guides, sample documents, Washington state employer case studies and more.

Case Studies – Featuring Washington employers. Find out how and why they put telework to work for their organizations.

Telework Cost/Benefit Analysis Tool – A downloadable online tool to help your company make informed decisions about telework (also included on the workshop CD).

Telework Works – A short online video. Learn the facts of teleworking and how other local companies are making it work for them. Produced July 2001.

Telework Readiness Criteria – For organizations, employees and managers. Some considerations to guide organizations and managers to assess ideal telework situations.

Frequently Asked Questions – Answers to common questions about telework.

Emergency Management – A smart addition to business continuity plans, a telework program can form the backbone of your emergency response plan.

Sample Documents – For employers and teleworkers. This portion of the website includes teleworker agreements, a selection tool, a teleworker proposal kit, a telework policy template, and telework promotional materials. (Samples of many of these tools are included in Section 7 of this workbook.)

Telework: Good Reasons & Great Tools – An online version of these workshop materials to help you find out how telework could benefit your company and how to get started.

FAQs

A comprehensive list of Frequently Asked Questions concerning telework is available on the Commuter Challenge web site at www.commuterchallenge.org/telework/faq.htm.

Additional telework resources

The following resources, which are not intended to endorse any products or consultants, provide a variety of helpful information on telework. Links to these resources are also available from the Commuter Challenge web site (www.CommuterChallenge.org):

Canadian Telework Association

<http://www.ivc.ca> is a detailed and frequently updated telework resource.

Center to Bridge the Digital Divide

<http://cbdd.wsu.edu> highlights Washington State University's rural telework program.

Commuter Connections

<http://www.mwcog.org/commuter/Bdy-Telework.html> provides telework information sponsored by the Metropolitan Washington Council of Governments in the D.C. area.

Denver Regional Council of Governments

<http://www.drcog.org/index.cfm?page=telework> is the Denver Regional Council of Governments page of telework resources and case studies.

Gil Gordon Associates

<http://www.gilgordon.com> is the site of national telework expert, trainer and consultant Gil Gordan.

HR Gopher

<http://www.hrgopher.com> is a directory of links to Human Resource sites on the Internet, including sites providing information on telework.

Inteleworks.com

<http://www.inteleworks.com> is a telework consulting and training company based in Georgia and founded by Michael Dziak, a telework expert.

International Telework Association & Council

<http://www.telecommute.org>

National TDM and Telework Clearinghouse

<http://www.nctr.usf.edu/clearinghouse>

TelecommuteCT

<http://www.telecommutect.com> is Connecticut's telework web site.

Telework Beat column

<http://www.networkworld.com/net.worker/columnists/kistner.html> is a weekly column titled "Telework Beat" by Toni Kistner in Network World.





Telework Collaborative

<http://www.teleworkcollaborative.com> is a six-state collaboration to provide telework materials and training.

Telework.gov

<http://www.telework.gov> is the joint Office of Personnel Management (OPM)/General Services Administration (GSA) web site on Telework/Telecommuting. "Telework: A Management Priority; A Guide for Managers, Supervisors, and Telework Coordinators" is available online.

Valley Metro

<http://www.valleymetro.org/Rideshare3/9Telework/Index.html> lists Valley Metro's telework resources in Phoenix, AZ.



Section 7: Case studies & telework tools

A variety of sample forms to get your telework program rolling are included at the end of this section. You can find online versions of these forms at www.CommuterChallenge.org or access them on the workshop CD.

Case studies documenting how Washington employers use telework, compressed workweeks and flextime are available on the Commuter Challenge web site (www.CommuterChallenge.org). These organizations include:

Alliance Data Systems
ARCO Products Company
Davis Wright Tremaine LLP
DDB Seattle
Electronic Data Systems
Evergreen State College
Frank Russell Company
Fred Hutchinson Cancer Research Center
Hewlett-Packard Company
Holland America Line Westours Inc.
Macy's
Matsushita Kotobuki
Pathology Associates Medical Laboratories
Precor
Providence Yakima Medical Center
Puget Sound Clean Air Agency
Red Dot Corporation
Seafirst Bank/Bank of America
Seattle Housing Authority
The Guardian Life Insurance Company of America
Washington Dental Service
Washington Mutual
Washington State Department of Transportation



SELECTION SURVEY FOR EMPLOYEES

Teleworking is the concept of working from home or another location (e.g., telework center) on a full or part-time basis. The attached questionnaire must be completed by each person interested in participating in the company's teleworking program. Every supervisor/manager must also fill out a similar questionnaire on their employees who are interested in teleworking. The results of both the employee and supervisor questionnaires can be used for selecting the potential teleworker.

Teleworking Screening Survey for Employees

Name _____

Supervisor _____ Classification _____

Department _____

1. Please describe your current job tasks. _____

2. The following four groups of characteristics relate respectively to your existing work, to your future work as it can be adapted to teleworking, to you as an employee, and to your manager. Please rate each characteristic as either high (H), medium (M), or low (L) by placing the appropriate letter in each blank.

Existing Work Characteristics

Please rate the following according to your existing job requirements and characteristics.

- _____ Amount of face-to-face contact required
- _____ Degree of telephone communications required
- _____ Autonomy of operation
- _____ Ability to control and schedule work flow
- _____ Amount of in-office reference material required

Future Work as a Teleworker

Please rate the following job characteristics in terms of their adaptability to teleworking.

- _____ Amount of face-to-face contact required
- _____ Degree of telephone communications required
- _____ Autonomy of operation
- _____ Ability to control and schedule work flow



_____ Amount of in-office reference material required

Employee Characteristics

Please rate the following according to your own characteristics as an employee, and as a teleworker.

- _____ Need for supervision, frequent feedback
- _____ Importance of co-workers' input to work function
- _____ Discipline regarding work
- _____ Desire/need to be around people
- _____ Potential friction at home if teleworking (e.g. interruptions due to caring for sick child or spouse)
- _____ Level of job knowledge
- _____ Quality of work

Supervisor Characteristics

Based on your perceptions of your supervisor's attitude towards teleworking, and his/her management style, please rate your supervisor according to the following.

- _____ Positive attitude toward teleworking
- _____ Trusts employee's ability to telework
- _____ Ability to establish clear objectives
- _____ Ability to communicate with employees

3. Considering the nature of your job, how much would you want to telework? (Circle one only)

- (a) About once every 2 weeks
- (b) About once a week
- (c) Two days a week
- (d) Three days a week
- (e) Occasionally for a special project

4. What kinds of work would you expect to do while teleworking? (Circle as many as apply.)

- (a) Writing/typing
- (b) Word processing
- (c) Data management/ computer programming
- (d) Administrative
- (e) Reading
- (f) Research
- (g) Talking on the phone
- (h) Sending/receiving electronic mail
- (i) Field visits
- (j) Thinking/planning
- (k) Other (please specify) _____



5. Given the amount of teleworking you want to do, and the kinds of work you would do while teleworking, what equipment/services would you need, and which of those do you currently have? (Check appropriate box.)

	Need	Currently Have
Computer/terminal	_____	_____
Printer	_____	_____
Modem	_____	_____
Desk, filing space, other furniture	_____	_____
Facsimile machine	_____	_____
Voice Mail	_____	_____
Other (please specify)	_____	_____ _____

6. Do you have adequate space in your home to dedicate to working?

(a) Yes (b) No

7. Are there any distractions/obligations that will make working at home difficult or impossible?

(a) Yes (b) No



SELECTION SURVEY FOR SUPERVISORS

Teleworking is the concept of working from home or another location (e.g., telework center) on a full or part-time basis. Every supervisor/manager must fill out a questionnaire on their employees who are interested in teleworking.

Teleworking Screening Survey for Supervisors

Name _____

Names of employees under your direct supervision who are considered candidates for teleworking: _____

1. Is the work done by any of your staff as it currently exists or with modifications suitable for teleworking, at least part of the time?

(a) Yes

(b) No Please explain why: _____

(If no, this completes the survey for you — thanks!)

2. Please describe the kind of work your employees do.

3. The rest of the survey should be completed for each of your employees who are interested in participating in the teleworking program. Some questions, such as those dealing with your management style, will probably have the same answers for each employee. Please rate each characteristic as either high (H), medium (M), or low (L) by placing the appropriate letter in each blank. Some questions, however, will inevitably have different answers for different employees. Please duplicate this form for each employee.

Existing Work Characteristics

Please rate the following according to your employee's existing job requirements and characteristics.

- _____ Amount of face-to-face contact required
- _____ Degree of telephone communications required
- _____ Autonomy of operation
- _____ Ability to control and schedule work flow
- _____ Amount of in-office reference material required



Future Work as a Teleworker

Please rate the following job characteristics for your employee in terms of his/her adaptability to teleworking.

- ___ Amount of face-to-face contact required
- ___ Degree of telephone communications required
- ___ Autonomy of operation
- ___ Ability to control and schedule work flow
- ___ Amount of in-office reference material required

Employee Characteristics

Please rate the following according to your employee's characteristics.

- ___ Need for supervision, frequent feedback
- ___ Importance of co-workers' input to work function
- ___ Discipline regarding work
- ___ Desire/need to be around people
- ___ Potential friction at home if teleworking (e.g. interruptions due to caring for sick child or spouse)
- ___ Level of job knowledge
- ___ Quality of work

Supervisor Characteristics

Based on your attitude towards teleworking and work style, please rate the following

- ___ Positive attitude toward teleworking
- ___ Trust employee's ability to telework
- ___ Ability to establish clear objectives
- ___ Ability to communicate with employees

4. What criteria do you use to evaluate your employee's work? (For example: quality of work, quantity of work, timeliness, etc. Please be specific.)





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5. Considering the nature of your employee's jobs, how much would you want him/her to telework? (Circle one only)
- (a) About once every 2 weeks
 - (b) About once a week
 - (c) Two days a week
 - (d) Three days a week
 - (e) Occasionally for a special project
6. What kinds of work would you expect him/her to do while teleworking? (Circle as many as apply.)
- (a) Writing/typing
 - (b) Word processing
 - (c) Data management/
computer programming
 - (d) Administrative
 - (e) Reading
 - (f) Research
 - (g) Talking on the phone
 - (h) Sending/receiving electronic mail
 - (i) Field visits
 - (j) Thinking/planning
 - (k) Other (please specify)



Proposal to Management Outline

Telecommuting will be resisted for reasons not based in reality. In order to assure success in your pursuit of a formalized telecommuting program, you must establish a clear telework philosophy that complements your organizational culture. Once the program is clearly characterized, you should develop three or four primary program drivers on which the entire program and its energy will be based - but don't just stop there. Stretch way outside the box to identify a list of secondary program goals using a variety of tools available on the market. With these goals established, you should next identify key stakeholders, identify and neutralize their objections, gather a consensus of support, and develop your internal champions.

(http://www.telecommute.org/TeleworkAmerica/twa_jan99.htm)

A **Proposal to Management** outlines initial steps that may be taken in winning management approval for a teleworking program at the workplace. In a 4-5 page summary, discuss the following issues:

- 1 – What is Teleworking
- 2 – What are the benefits to the company
- 3 – Which departments would be targeted
- 4 – Given type of business and corporate culture, which job functions would be ideal
- 5 – What are the costs, if any
- 6 – What technological requirements will there be, if any
- 7 – What savings to the company will there be, if any
- 8 – What are the next steps

Use Commuter Challenge's Work Options Costs and Benefits tool to determine the costs and benefits of telework to your organization. This tool is provided on the workshop CD and is available for download on the website at www.CommuterChallenge.org.

The **Telework Policy** provides guidelines on the teleworking program. It defines the parameters of the teleworking arrangement. The policies must fit the existing corporate culture.

Sample Telework Program Policy

Teleworking, or telecommuting, is the concept of working from home or another location on a full- or part-time basis. Teleworking is not a formal, universal employee benefit. Rather, it is an alternative method of meeting the needs of the company. The company has the right to refuse to make teleworking available to an employee and to terminate a teleworking arrangement at any time. Employees are not required to telework. Employees have the right to refuse to telework if the option is made available. The company's policies for teleworking are as follows:

Compensation and Work Hours

The employee's compensation, benefits, work status and work responsibilities will not change due to participation in the teleworking program.

The amount of time the employee is expected to work per day or pay period will not change as a result of participation in the teleworking program.

Eligibility

Successful teleworkers have the support of their supervisors. Employees will be selected based on the suitability of their jobs, an evaluation of the likelihood of their being successful teleworkers, and an evaluation of their supervisor's ability to manage remote workers. Each department will make its own selections.

Upon acceptance to the program both the employee and manager will be expected to complete a training course designed to prepare them for the teleworking experience. All teleworkers must sign an agreement.

Equipment/Tools

The company may provide specific tools/equipment for the employee to perform his/her current duties. This may include computer hardware, computer software, phone lines, email, voice-mail, connectivity to host applications, and other applicable equipment as deemed necessary.

The use of equipment, software, data supplies and furniture when provided by the company for use at the remote work location is limited to authorized persons and for purposes relating to company business. The company will provide for repairs to company equipment. When the employee uses her/his own equipment, the employee is responsible for maintenance and repair of equipment.

A loaner laptop may be provided when available. Loaner computers will vary in performance and configuration. Loaners must be returned upon request.

The **Teleworker's Assignment** is completed to define the specifics of teleworking such as frequency, type of work to be completed, the number of times the employee should communicate with the office, etc. The Assignment is completed by the teleworker and the telemanager.

Sample Teleworker's Assignment

Teleworking, or working from another location such as home or an office close to home, is an assignment that the company may choose to make available to some employees when a mutually beneficial situation exists.

Teleworking is not an employee benefit, but rather an alternative method of meeting the needs of the company. Employees do not have a "right" to telework. The arrangement can be terminated by either the employee or the company at any time.

Conditions for teleworking agreed upon by the teleworker and his/her supervisor:

1. The employee agrees to work at the following location:

2. The employee will telework _____ days per week.

3. The employee's work hours will be from _____ a.m. to _____ p.m.

4. The following are the assignments to be worked on by the employee at the remote location, with expected delivery dates:

5. The following equipment will be used by the employee at the remote location:

6. The employee agrees to call the central office to get his/her messages at least _____ times per day.





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- 7. The employee agrees to get all supplies needed for teleworking from the company office. Reimbursement for out-of-pocket expenses for supplies will need prior supervisory approval.

- 8. Additional conditions agreed upon by the telemanager and teleworker are as follows:

I have reviewed the teleworker's assignment with _____ prior to his/her participation in the company's teleworking program.

Date

Supervisor Name

Signature

The above material has been discussed with me.

Date

Employee Name

Signature



Section 8: Grants, incentives & assistance

Telework grants, incentives, and special assistance periodically become available through various organizations and jurisdictions. Check the website at www.commuterchallenge.org for the most up-to-date information. At the time of this workbook printing, the following programs are available to qualifying King County employers:

- Commuter Challenge, as part of its ongoing work with King County Metro to provide assistance to employers interested in developing and/or implementing telework programs, provides free consulting services to eligible worksites within King County. Contact Steve Gerritson at 206-389-8656 or sgerritson@commuterchallenge.org for more information.
- King County will reward organizations up to \$5,000 for implementing a telework policy. The size of the incentive is based on the number of employees who telework a minimum of one day a week during the first three months. Policy commitment is for at least 12 months and requires documentation on the number of employees teleworking and the commute trips reduced. Employers should have more than 20 employees and provide at least a 50 percent transit commute subsidy. Contact Ref Lindmark at 206-684-1104 or Ref.Lindmark@metrokc.gov for more information.

