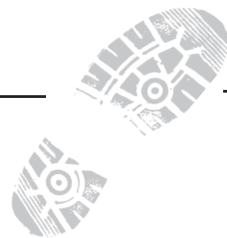


LAUNCHING TELEWORK

The nuts and bolts for employers

The Step-by-Step Guide



OREGON
DEPARTMENT OF
ENERGY

625 Marion Street N.E. • Salem, OR 97301-3737
Phone 1 (800) 221-8035 • Fax (503) 373-7806

Table of Contents

1. The Initial Steps	3
A. Establish a telework advisory committee	3
B. Select a telework coordinator	3
2. Setting the Course for Telework	4
A. Define the program's scope	4
B. Identify appropriate telework tasks and jobs	4
C. Develop eligibility criteria for teleworkers	5
D. Assess equipment needs and security issues	6
E. Develop a telework proposal for management	7
F. Write a telework policy	7
3. From Plan to Action	8
A. Promote telework internally	8
B. Selecting potential teleworkers	8
C. Training teleworkers and supervisors	9
4. Checking In	10
A. Evaluating the teleworker	10
B. Evaluating the program	10
C. Maintaining the program	10

“Telework’s selling points have evolved in the past 15 years from less time spent in traffic, a better work-life balance, bottom-line benefits for employers and employees, and benefits to society in general, such as better air quality and less overall pollution.”

**– Chuck Wilsker,
president and CEO,
Telework Coalition,
August 2007**



1. The Initial Steps

A. Establish a telework advisory committee

The first step is to establish a team representing a cross-section of departments to develop the organization’s telework program. Members might include management and representatives from human resources, information technology, policy and planning, and training. The committee’s main role is developing the telework program and reviewing its progress.

B. Select a telework coordinator

The telework coordinator leads this committee, overseeing all activities of the team and serving as the point person for all facets of your organization’s telework program.

The coordinator should be a champion of telework and should have time to devote to overseeing the program. The coordinator should have the support of management and experience with starting new programs. Other responsibilities of the coordinator include promoting the program, organizing training for staff, ensuring that telework agreements are completed and filed, assisting with evaluations, and maintaining the program.

Having the right person start a telework program and serve as a liaison between teleworkers and management is critical to the program’s success.



2. Setting the Course for Telework

A. Defining the program's scope

In order to create the best telework program for the organization, the committee should define the scope of the program and set clear, measurable goals to help guide them through the process. First, the committee should consider what the organization wants to gain from telework.

Specific goals could include:

- Reduce overhead costs and office space needs
- Improve employee morale and job performance
- Tap into nontraditional workforces
- Ensure business continuity in case of emergency or natural disaster

Next, the committee should decide whether the program will begin as a pilot and how far the program will eventually reach. Will it be organization-wide or will it be geared toward certain departments?

A pilot program helps management learn about telework before making a full commitment. It also allows for the organization to learn how effective the program is at accomplishing the goals set forth at the start and how it might be adjusted to better meet the company's goals. Starting small and expanding often ensures a greater degree of success.

Finally, the committee will set a timeline with benchmarks for where the program should be after two months, four months and six months. A basic outline will help the program stay on track and continue to move forward. Timelines will vary depending on the size of the organization and the scope of the project.

B. Identify appropriate telework tasks and jobs

To select jobs suitable for telework, the coordinator considers each position and determines whether there is any potential to create a telework opportunity and whether the telework will be full-time, part-time, or episodic depending on the individual.

A particular position may not appear to be compatible with a telework arrangement, but if the position is broken down into individual tasks, it may be discovered that certain duties could be accomplished in a telework setting.

The 2007 Society for Human Resource Management benefits survey showed that 56% of the 590 U.S. companies surveyed were offering some form of telework in 2007, up from the 51% that did so in 2006.

TYPICAL TELEWORK TASKS

Analysis
Auditing reports
Computer programming
Conducting business by phone
Data entry
Design work
Editing
Evaluations
Field visits
Maintaining databases
Planning
Preparing budgets
Preparing contracts
Project management
Reading
Record keeping
Research
Thinking
Writing

Work suitability depends on job content, rather than job title, type of appointment, or work schedule. Telework frequency may be as little as one day a week or even once a month. Most companies limit telework to two or three days a week. No position should be automatically ruled out as telework-suitable.

Telework is feasible for:

- Work that requires thinking and writing, such as data analysis, research, reviewing grants or cases, and writing regulations, decisions or reports.
- Telephone-intensive tasks, such as setting up a conference, obtaining information and contacting customers.
- Computer-oriented tasks, such as programming, data entry, graphic design, auditing, and word processing.

Telework may not be practical for:

- Jobs that require the employee's physical presence on the job or jobs in which the employees need to have extensive face-to-face contact with their supervisor, other employees, clients, or the public.
- Positions that require access to material that cannot be moved from the regular office.
- Work involving security-sensitive materials.

C. Develop Eligibility Criteria for Teleworkers

Having eligibility criteria determines which employees in your organization can apply to the telework program. It's better to keep the eligibility criteria as general as possible and use the selection process to address personalities and positions.

Consider these questions in developing criteria:

- **Will both permanent and temporary employees be eligible to telework?** The answer to this question depends on what makes the most sense for the organization.
- **How long has the employee worked for the organization?** An employee with strong institutional knowledge of your organization generally adjusts to telework more quickly, but exceptions may be recommended when a relatively new employee is working on projects independently or when a highly skilled prospective employee will accept a position only if allowed to telework.

-
- **Which job types will be allowed to telework?** Although it may be tempting to exclude certain job titles because they appear unsuitable for telework, using job titles as an eligibility criterion is not recommended. More jobs than you would first imagine can be accomplished offsite one or two days a week.
 - **Will union members be included in the program?** Participation of union employees may require union approval. To ensure a smooth integration of union employees, meet and confer with union representatives early in the development of your telework program.
 - **Will eligibility depend on an employee's most recent performance evaluation?** Telework can be established as an incentive to employees with high performance evaluations.
 - **Will employees whose jobs involve handling of sensitive information be allowed to telework?** This should only be permitted when safeguards are put in place to ensure that such materials can be kept secure.

D. Assess Equipment Needs and Provide for Security of Sensitive Information

Computers, remote connectivity, electronic communications, paperless work processes have made work increasingly mobile. Equipment needs for individual teleworkers, however, may vary greatly.

Because some employees don't use computers in their jobs, it is possible to run a telework program without purchasing equipment. And those who frequently use computers could spend their telework days working on tasks that don't require a computer.

The committee should include a section in their telework policy regarding how teleworkers will be equipped. Your organization may choose to purchase all or some of the necessary equipment, or the employee could be responsible for acquiring equipment. Factors to consider include technology needs based on the work of the employee, agency security requirements, and budget constraints. Within those constraints, the challenge for the committee is finding the right balance of budget, security, and effectiveness.

To assess their home offices, employees should complete the Home Office Assessment. Potential teleworkers should also complete the Ergonomic Assessment to make sure their workspace is arranged in such a way as to minimize the risk of incurring short-term or long-term injuries. Both forms are available online at www.oregon.gov/ENERGY/TRANS/Telework/telehm.shtml. Based on the results of the Home Office Assessment, the coordinator must determine what

TYPICAL TELEWORK EQUIPMENT

Telephones

Cell phones

Voice mail

Desktop computers

Laptop computers

Software

Broadband Internet access

Scanner/Printer

PDA's (personal digital assistants)

According to the 2007 Society for Human Resource Management benefits survey, employers are making sure that workers stay connected wherever they toil. Fifty-three percent of employers that said they provided workers with a cell phone, pager or handheld device for their personal use in 2007, up from 48% in 2006.

PROMOTING TELEWORK TO MANAGEMENT

When presenting a telework program it's wise to emphasize that telework will not affect client service and is expected to enhance productivity. In most cases, clients won't be aware of the teleworkers' location.

additional equipment is necessary to ensure teleworkers are adequately equipped and that their workspace is safe and secure.

The committee should then develop a budget for acquiring essential equipment.

E. Develop a Telework Proposal for Management

By this point, the committee has designed the basic framework for the organization's telework program. They've defined the scope and goals of the project, determined what tasks would be ideal for telework, established the criteria for participating in the program, and assessed the equipment needs. It's now time to provide management with a document that outlines what the program proposes to accomplish and how it will achieve the goals set forth.

When drafting the proposal, include the following components:

- Definition of telework
- How telework will benefit the organization
- Program goals and scope
- Tasks appropriate for telework
- Teleworker selection process
- How employees will be supervised
- How equipment issues will be resolved
- How liability issues will be resolved
- Program evaluation plan
- Timeline and budget

F. Write a Telework Policy

Once management approves the proposal, the committee can write a policy document that will serve as a guide to inform potential teleworkers and supervisors about how the telework program will work. This policy is the cornerstone of your telework program and will be referred to for years to come as more and more employees apply to telework.

This policy should be revised as needed. After the designated trial period is complete and the committee has had a chance to evaluate the effectiveness of the program, the policy may need to be adjusted to better fit the company. A sample telework policy is available online at www.oregon.gov/ENERGY/TRANS/Telework/telehm.shtml.



3. From Plan to Action

A. Promote telework internally

Building interest in the organization's telework program from the beginning is vital in ensuring that the employees view telework in a positive light. As the program develops, the coordinator should share information organization-wide.

Here are some ways to get the word out and encourage participation in telework:

- Discuss the program with managers
- Send memos and e-mail updates companywide
- Encourage questions and solicit suggestions throughout the process
- Display posters and flyers in high-traffic areas
- Write an article in the company newsletter
- Include information in new hire packets
- Provide financial incentives to help set up a home office

When spreading the word about your organization's telework program, it's important to remember that employees may need to be educated about what telework is, what it isn't, how it works, and how they can benefit from a more flexible work arrangement.

B. Selecting Potential Teleworkers

The primary goal of your selection process is to ensure that the best-suited employees are selected as teleworkers.

Once an employee who meets the criteria expresses interest in telework, a supervisor should assess the employee, using the Potential Tele-worker Assessment available online at www.oregon.gov/ENERGY/TRANS/Telework/telehm.shtml. This form is a tool to help supervisors decide if a telework arrangement will suit a particular individual.

It may be tempting to look for one set of black-and-white rules to base selections on, but the success of telework depends on the following specific factors:

- **Employee's work habits.** How well does the individual match the attributes of a successful teleworker?
- **Employee's job.** Can some tasks be done outside the central office?

HOW TELEWORK BENEFITS THE WORKER

Less stress

Fewer long commutes means less stress for employees and their families.

Saving fuel, time and money

Less time on the road leads to considerable savings in fuel costs and vehicle wear and tear. It also means less time away from home.

Less overtime

Improved productivity and efficiency during telework hours often reduces the need to work overtime.

CHARACTERISTICS OF A GOOD TELEWORKER

Some employees are naturally better suited to telework. Here are some characteristics to watch for when choosing teleworkers:

- Well-organized
- Enjoys working alone
- Goal-oriented
- Interested in telework
- Self-starter
- Flexible
- Responsible
- Works well independently
- Effective communicator

ATTRIBUTES OF A GOOD TELEWORK MANAGER

- Trusts employees
- Has a results-oriented style
- Keeps an open, positive attitude toward telework
- Tries to accommodate telework scheduling
- Provides timely and constructive feedback
- Facilitates open communication

- **Supervisor's style.** Is the supervisor well suited to manage a teleworker?
- **Employee performance.** Is the employee successful in his or her current position?

C. Training Teleworkers and Supervisors

Proper training helps to reduce the number of potential problems and increase the likelihood that telework will be a positive experience for both teleworkers and their organizations. You should hold separate training sessions for supervisors and teleworkers.

The approach to training will vary depending on each organization's needs, but the overall training objectives are the same:

- To become familiar with the telework policy
- To ask questions and get answers
- To learn techniques for successful teleworking and telework supervising

Training concludes with a supervisor and the employee discussing the details of their specific telework agreement in order to set clear expectations. Together they designate the type and frequency of telework for the employee, the schedule for routine and emergency work situations, the remote work location, the teleworker's individual responsibilities with regard to maintaining telework security measures and home office ergonomic requirements. A sample Telework Agreement is available online at www.oregon.gov/ENERGY/TRANS/Telework/telehm.shtml

Tips for supervisors

- Give praise as soon as noticed.
- Be honest with your teleworker if concerns arise.
- Be available through multiple forms of communication.
- Ask for input from coworkers and clients about your teleworker's performance.
- Respect your meeting schedule with your teleworker.
- Integrate a review process into the telework agreement.

Tips for teleworkers

- Understand there will be an initial adjustment period before you get used to telework.
- Plan telework days, making sure you have necessary files and have forwarded your calls.
- Maintain your meeting schedule with your supervisor.
- Focus on maintaining good communication.
- Be honest with your supervisor if you need to change your telework situation.



4. Checking In

A. Evaluating the teleworker

A sample Teleworker Performance Evaluation can be found online at www.oregon.gov/ENERGY/TRANS/Telework/telehm.shtml

This form should be completed periodically by the supervisor and will provide a framework for performance evaluation.

B. Evaluating the program

Building a successful program requires assessing it in its infancy. A thorough evaluation will show the program's progress, its strengths and weaknesses, and its impact on office overhead costs. The main reasons for evaluating the program is to measure how well the program objectives are being met and decide how the program should be adjusted to better meet those objectives.

Evaluations can be as simple as a multiple-choice survey or as complex as hiring outside consultants to conduct extensive research. A typical evaluation, however, includes the following steps: designing the evaluation, collecting data, analyzing data, writing a report and presenting findings.

C. Maintaining the program

To keep your telework program running smoothly, the coordinator should first and foremost be attuned to the program's participants, their successes, and their challenges. Other strategies to consider:

- Keep track of new teleworkers and make sure their entrance to the program is well planned.
- Find out how telework is working for others in the organization by visiting with departments indirectly affected, including technical support.
- Hold periodic informal group discussions to give teleworkers an opportunity to share concerns.
- Keep the program visible and generate interest by writing articles for the company newsletter.

Almost every telework program will need some regular upkeep and fine-tuning, but now that your program is in place, the rewards of teleworking will soon be apparent.

METHODS FOR EVALUATING YOUR TELEWORK PROGRAM

Conduct **surveys** of your teleworkers to gauge attitudes toward home environment, work environment, productivity, job satisfaction, travel patterns and teleworking in general.

Hold separate **focus groups** where teleworkers and telework supervisors can freely discuss their experiences and share concerns.

Carry out **in-person or telephone interviews** to gather individual assessments of the effectiveness of your organization's telework program and how it could be improved.

"Telework offers three big benefits: It's a vital piece of businesses' continuity-of-operations plans, a way to reduce fuel consumption and related costs, and the ever-growing realization that if we don't stop global warming soon, things on our small planet might irreversibly change for the worse. All those benefits are cumulative."

**– Chuck Wilsker,
President and CEO,
Telework Coalition,
August 2007**



OREGON
DEPARTMENT OF
ENERGY

625 Marion Street N.E. • Salem, OR 97301-3737
Phone 1 (800) 221-8035 • Fax (503) 373-7806