

**TOWN OF FAIRFAX
STAFF REPORT**

To: Mayor, Members of the Town Council
From: Michael Rock, Town Manager 
Laurie Ireland-Ashley, Finance Director
Date: April 7, 2010
Subject: Discussion and Consideration of Draft Telecommuting Policy.

RECOMMENDATION

Discuss and consider the attached draft policy for telecommuting.

DISCUSSION

The Finance Department in the first step towards a well defined administrative Town policy and procedure structure submits the first policy for Council review.

The *Telecommuting/Telework Policy* is based on the State of California January 2010 Statewide Telework Model Program. The State of California was the first state government to embark upon the idea that work could be performed in alternate work locations. The State has encouraged telecommuting or telework since September 30, 1990 under Government code section 14200-14203. The State has excellent resources available at the Department of General Services (DGS) who are very committed to increasing telecommuting in the State.

Telework is:

- Managing by results – performance – specific and measureable
- Reducing operating and overhead costs – stimulates productivity
- Planning a continuity strategy for disaster and emergency recovery (for example the Governor s executive order after the earthquake of October 17,1989 to facilitate getting the State back up doing business by ordering more employees to telework during the crisis).
- Total automobile trips are reduced, improving the air pollution, reducing the traffic congestion, improved quality of life, and conserving energy
- Helping to recruit and retain skilled employees, reduced absenteeism, improved employee health and wellness
- Enhanced working experience and opportunities for those with mobility restrictions, and increased work options for employees on temporary limited duty.

The Telecommuting policy is an extremely comprehensive policy with specific and measurable attachments addressing the telework arrangement parameters, a safety checklist complete with work station arrangement to ensure an ergonomic setup moving the Town forward into the 21st century in a very green way.

The policy requires a request to be submitted to the Department Head and approval by the Town Manager. All requests must be renewed annually. It can be terminated immediately for cause, and terminated without cause, at any time, for any reason, with 30 days written notice.

The two types of telework schedules are Casual which results from injury or illness and Regular which is an established schedule on the Telework Arrangement Form (attachment A).

The two-year pilot program completed by the State between 1987 -89 was so successful that the State moved to developing telework policies, and in 1994 passed an amendment which called for every State agency to review its work operations to determine where telecommuting can be a practical benefit to each agency.

With the advent of the server supported network we are all 'remote commuting' everyday as we access the Town server from our desktops (which are an illusion stored on the server) so telecommuting via the internet is merely a longer access in the same format.

When one is telecommuting the user is accessing the secure login database via webvpn (by Cisco), which builds the bridge for the communication, then using the program Remote Desktop Connect the user can 'drive' across the communication bridge to have full control of their desktop at the main office of the Town. The user sees the same screen as if they were sitting at the desk in Town Hall. All the files are saved on the server and all the work is done over a secure network connection. All the companies, including State and local governments that utilize telework have show marked increase in productivity.

ATTACHMENTS

1. Draft Telecommuting/Telework Policy
2. Telework Arrangement (Attachment A)
3. Safety Checklist/Acknowledgment (Attachment B)
4. Setting Up In-Home Office (Attachment C)
5. Supervisor Checklist (Attachment D)
6. Considerations for Selecting Teleworkers (Attachment E)
7. State of California Telecommuting Program

Section x	IT Security Policies	1/1/2010	-Effective
Policy x.xx	Telecommuting/Telework Policy	1/1/2010	-Revised
		Information Technology	-LBIA

Introduction

Appropriately planned and managed, telecommuting is a work option that can benefit managers, employees, and customers. Telecommuting is an important means to reduce air pollution, traffic and parking congestion, the high costs of highway commuting, and demand for office space. Telecommuting stimulates employee productivity while giving workers more flexibility and control over their lives. The State of California was the first state government to embark upon the idea that work could be performed in alternate work locations. With the technology of the 21st century the virtual workplace has become a reality. The State of California has encouraged telecommuting or telework since September 30, 1990 under Government code section 14200-14203: State Employee Telecommuting Program. This policy is based on the January 2010 Statewide Telework Model Program.

Benefits

The Town of Fairfax expects the following benefits through the use of telecommuting – telework:

- Improved employee performance and morale
- Optimum use of office facilities
- Reduced absenteeism
- Improved employee health and wellness.
- Increased work options for employees on temporary limited duty
- Improved air quality and reduced traffic and parking congestion.
- Enhanced working experience and opportunities for those with mobility restrictions.
- Effective continuation of business as part of a disaster recovery or emergency plan.

Purpose

The purpose of the Town of Fairfax Telecommuting Policy is to establish the rules for the use of an alternate work location for employees to perform their usual job duties away from the central workplace.

Audience

The Town of Fairfax Telecommuting Policy applies equally to all individuals granted telecommuting work arrangements with the Town of Fairfax.

Section x	IT Security Policies	1/1/2010	-Effective
Policy x.xx	Telecommuting/Telework Policy	1/1/2010	-Revised
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Definitions

Telecommuting: A work arrangement in which supervisors direct or permit employees to perform their usual job duties away from their central workplace, in accordance with work agreements.

Work Agreement: The written agreement between the employer and employee that details the terms and conditions of an employee's work away from his or her central workplace. Work Agreements are required for Telecommuting.

Alternate Work Location: Approved work sites other than the employee's main office where official Town business is performed. Such locations may include, but are not necessarily limited to, employees' homes and satellite offices.

Work Schedule: The employee's hours of work in the central workplace or in alternate locations.

Information Assets: All categories of information (confidential, personal, sensitive, or public), all forms of information assets (paper or electronic), information technology facilities, equipment and software owned or leased by the Town.

Remote Access: the connection of an information asset (computing equipment, etc.) from an off-site location to an information asset on Town infrastructure.

Telework Schedules:

- **Casual:** a *casual* or *limited* telework arrangement to accommodate: 1) convalescence from an injury or illness, 2) a recovering family member in need of limited in-home assistance, 3) the last weeks of pregnancy, and/or following childbirth, 4) an inaccessible main office, 5) blocked commute routes (i.e., major road construction, storm, or a disaster) 6) special project work requiring an extended period of non-interruptible time.

- **Regular:** an established telework schedule of days per week or month that centers on the needs of Town of Fairfax.

Teleworker: an employee that teleworks.

Teleconferencing: holding a conference among people remote from one another by means of telecommunication devices (e.g. telephones or computer terminals).

Home Office: an area designated within the employee's home for the purpose of performing Town work.

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Management

The Town is responsible for the implementation of the Telework Program and encourages the use of the telework option where work conditions warrant. The Town will ensure that:

- Employee compensation benefits, work status, and work responsibilities will not change due to participation in the Telework Program.
- The amount of time the teleworker is expected to work per pay period will not change.
- Managers and employees will familiarize themselves with the teleworking policy and procedures contained in this document, information security and Telework and Remote Access Security Standard prior to the commencement of approved telework arrangement.
- Town information assets are secure and confidential, personal and sensitive information is protected.
- Ensuring compliance with all applicable policies, procedures, and guidelines.
- Identifying job tasks suitable for telework.
- Determining if teleworking staff will contribute to program objectives, while maintaining or improving efficiency, productivity, and customer service.
- Determining that telework arrangements are mutually beneficial prior to submitting to the next higher level of approval if required.
- Overseeing the day-to-day performance of teleworking employees, as they would on-site employees, including communicating general office updates and related information to teleworkers.
- Ensuring teleworking employees indicate the hours they have teleworked in accordance with the Town's established policy and procedures, as they would non-teleworking employees.
- Approval of the teleworker's use of sick leave, vacation, time off, or other leave credits, as well as any overtime work.
- Providing teleworkers with specific, measurable, and attainable assignments, just as they would non-teleworking employees.

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Employees

Employees interested in becoming teleworkers are responsible for:

- Understanding the requirements contained in the Town Telework Program Policy and Procedures.
- Submitting a request to telework to their supervisor.
- Working with their supervisor to develop mutually acceptable telework arrangement.

See the Telework Arrangement form, Attachment A.

When a telework arrangement is approved, employees are responsible for:

- Abiding by the provisions set forth in the Town Telework Program Policy and Procedures.
- Establishing and maintaining a work area that is clean, safe, and free from hazards.

Employees working at home must complete the Safety Checklist/Acknowledgement, Attachment B, and certify its accuracy on an annual basis.

- Maintaining Town and/or personally owned equipment, devices, and services associated with achieving a safe, secure and healthful telework environment.
- Reporting security incidents immediately to their supervisor.
- Repairing and/or replacing any damaged, lost, or stolen Town-owned equipment assigned to the teleworker, if the damage, loss or theft is determined by management to be due to gross negligence on the part of the employee.
- Complying with all applicable policies, standards, procedures, and guidelines.
- Complying with tax laws.

The Town is not responsible for substantiating an employee’s claim of tax deductions for operating an office in the employee’s home. An employee should seek advice from a tax advisor concerning in-home office deductions.

Eligibility

It is the Town Manager’s discretion to determine what employees are eligible to participate in the Telework program.

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**Types of
Telework
Schedules**

Town provides for two telework schedules:

Casual – Employees may be allowed to telework on a temporary and/or episodic basis as duty assignment permits.

Circumstances which may be appropriate for temporary telework include, but are not limited to the following:

- Special project work requiring extended uninterrupted time.
- During convalescence from injury or illness.*
- During the last few weeks of pregnancy and/or following the birth of a child.
- While all reasonable commute routes are blocked (i.e., major construction, storm, disaster).
- If the primary worksite is inaccessible or not habitable.

Regular – Regular telework is an established schedule per week or month. Supervisors and/or managers must approve any change in the agreed upon schedule, and append it to the Telework Arrangement form.

- The supervisor and teleworker must take steps to prevent the teleworker from becoming isolated from the main office staff; therefore, in-home office telecommuters may be required to spend a minimum of one day per week in the main office, except under unusual conditions.
- Full-time teleworking (100% of teleworker’s hours) is permissible when necessary to accommodate medical restrictions or physical disabilities, recruit and retain highly skilled expertise or is contingent on the needs of the job.*

Note:

- Teleworking is not to be used for dependent care purposes.

* An employee may request a reasonable accommodation in accordance with the Town’s policy and procedures.

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Technology and Equipment Needs Overview

Before allowing a telework arrangement, the manager and/or supervisor and employee will determine the equipment needed for telework on a case-by-case basis. The types of technology services (internet services), access to Town IT infrastructure and equipment that will be necessary to support the proposed telework arrangement must be identified.

Not all teleworkers need to perform functions or tasks that require computer equipment or service nor does telework necessarily entitle the teleworker to town-owned assets such as: computer, software, printer, fax machine, furniture, telephone, or a business telephone line nor does it entitle the employee authorization to use personally-owned equipment.

Managers and/or supervisors must:

- Carefully weigh the costs and benefits of a telework arrangement, particularly ones that will require additional departmental expense for services or equipment (e.g. the purchase of new computer equipment or cable trenching to allow for a business telephone line).
- Work with the Town Information Technology Department to assess telework technology hardware and software needs and to provide the necessary services, equipment and supplies to teleworkers.
- Ensure that the telework infrastructure, including computing equipment at the agency that hosts telework connection and the computing equipment used by the teleworker to connect, is installed, maintained and updated in accordance with Town information security policies, standards, and procedures.

Office Supplies

Town will supply approved teleworkers with necessary office supplies (pens, pencils, stationary, envelopes, etc.). These supplies should be obtained through the teleworker's supervisor.

Restricted Use

The employee acknowledges that the use of any Town provided equipment, software, data, and supplies is limited to authorized teleworker use and only for purposes related to Town business, or as allowed by law or under MOU provisions.

Property Control

Managers and/or supervisors must properly account for Town telework property by ensuring the following steps are taken:

- Tag all Town equipment with a property/asset identification number for property inventory and control purposes.
- Maintain a record of all property, by teleworker and tag number, purchased and/or issued to teleworkers for telework purposes.
- Maintain a record of services used by teleworker (i.e. telephone line(s), service provider, internet connection, service identification number, etc.) that were acquired and/or installed at the teleworker's home.

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**Employee
Provided
Equipment**

Only Town-owned computing equipment may be used to connect to town IT infrastructure at the network-level unless the following conditions are met:

- Written authorization is provided by Town management.
- An exception in accordance with an authorized process has been approved.
- The teleworker's computing equipment and software complies with the Town Telework and Remote Access Security standards.

When an exception has been approved, the following applies:

- Employee's personally-owned equipment maintenance and repairs remain the responsibility of the employee.
- Town does not assume any liability for loss, theft, damage, or wear of employee's personally-owned equipment as a result of telework-related activity.

NOTE: Employees who use their personal computing equipment for work purposes subject their hard drive, software, and/or any other type of electronic storage media, to the possibility of subpoena or lack of privacy through legal action taken against, or by, the town (Electronic Communication Privacy Act).

**Reimbursable or
Shared Costs**

Town will reimburse teleworkers for business expenses necessary for performing work assignments.

- Supervisors must pre-approve in writing all such reimbursements.
- Reimbursements will be made via normal purchase and/or reimbursement procedures.

Note: Town will not be liable for telework expenses not identified in the employee's telework arrangement, including, but not limited to, any investment in furniture, equipment or services for the designated workspace in the teleworker's home office.

Additional points:

- Supervisors will review usage charges for a home dedicated voice or data line and if approved, the Finance Department will make payment.
- Teleworkers using their own residential telephone for business-related calls may be reimbursed for those expenses. The teleworker should submit a Travel Expense Claim along with receipts, bills or other verification of expenses pursuant to travel expense claim procedures.
- On a case-by-case basis, the supervisor will decide whether any telework expenses not specifically covered in this policy are reimbursable.

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Health and Safety

Town expects teleworkers to maintain the same safe working environment at the telework site as they would have at the main office.

- Employees who telework must have a fire extinguisher and smoke detector in the home.
- Teleworkers shall have pre-established evacuation plans and first aid supplies.
- In-home offices shall be clean and free of obstructions and hazards.
- Resources on how to set up an ergonomic workstation are available on the California Department of General Services website.

IMPORTANT: Failure to maintain a safe work environment, in accordance with this policy, is cause for discontinuing employee participation in the Telework Program. Review "Safety Checklist/Acknowledgement" and "Setting Up A Home Office." (Attachments B and C)

Self-Certification

Teleworkers are responsible for self-certifying that the in-home office complies with identified safety requirements by completing and signing the "Safety Checklist/Acknowledgement" in Attachment B. Management retains the right to make inquiries as to the status of the in-home office work environment.

Work-Related Injury

If a teleworking employee incurs a work-related injury, worker's compensation laws and rules apply just as they would if such an injury occurred at the main office. Employees must notify their supervisors immediately and complete all necessary documents regarding the injury.

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Disciplinary Actions Violation of this policy may result in disciplinary action which may include termination for employees and temporaries; a termination of employment relations in the case of contractors or consultants; dismissal for interns and volunteers; or suspension or expulsion in the case of a student. Additionally, individuals are subject to loss of Town of Fairfax Information Resources access privileges, civil, and criminal prosecution.

Supporting Information **This Security Policy is supported by the following Security Policy Standards.**

Reference # Policy Standard detail

- 3 All personnel are responsible for managing their use of IR and are accountable for their actions relating to IR security. Personnel are also equally responsible for reporting any suspected or confirmed violations of this policy to the appropriate management.
- 6 The use of IR must be for officially authorized business purposes only. There is no guarantee of personal privacy or access to tools such as, but not limited to; email, Web browsing, and other electronic discussion tools. The use of these electronic communications tools may be monitored to fulfill complaint or investigation requirements. Departments responsible for the custody and operation of computers (custodian departments) shall be responsible for proper authorization of IR utilization, the establishment of effective use, and reporting of performance to management.
- 7 Any data used in an IR system must be kept confidential and secure by the user. The fact that the data may be stored electronically does not change the requirement to keep the information confidential and secure. Rather, the type of information or the information itself is the basis for determining whether the data must be kept confidential and secure. Furthermore if this data is stored in a paper or electronic format, or if the data is copied, printed, or electronically transmitted the data must still be protected as confidential and secured.
- 8 All computer software programs, applications, source code, object code, documentation and data shall be guarded and protected as if it were town property.

References

Copyright Act of 1976
The Health Insurance Portability and Accountability Act of 1996 (HIPAA)
The State of California Information Act
California Government Code, Section 14200-14203

ATTACHMENT A – TELEWORK ARRANGEMENT

(Continued)

Both the manager/supervisor and teleworker understand that telework is a bilateral voluntary arrangement that can be discontinued at either party's request with no adverse repercussions.

- Supervisors must approve in advance the use of, vacation, time off, or other leave credits, as well as any overtime work.
 - A teleworker must forgo telework when their physical presence is required in the office on regularly scheduled telework day. Managers and/or supervisors should provide reasonable notice whenever possible. If required, the employee may be required to report to the office without advance notice.
-

The Town] may reimburse teleworkers for business expenses necessary for performing work assignments.

- ▶ Supervisors must pre-approve in writing all such reimbursements.
 - ▶ The Town will not be liable for telework expenses not identified in the telework arrangement.
 - ▶ Teleworkers must return Town owned equipment to Town for maintenance and repair.
 - ▶ Teleworkers should submit a Travel Expense Claim along with receipts, bills or other verification of expenses pursuant to travel expense claim procedures.
-

The Town will not pay for the following expenses:

- ▶ Maintenance or repairs of privately owned equipment.
 - ▶ Utility costs associated with the use of the computer or occupation of the home.
 - ▶ Equipment supplies (these should be requisitioned through the main office).
 - ▶ Travel expenses associated with commuting to the main office, other than authorized transit subsidies.
-

Additionally:

- Teleworkers must be available by phone or e-mail during their designated work hours.
- Telework is not a substitute for dependent care, and teleworkers must make regular dependent care arrangements.
- The teleworker has read and understands the Town Telework Program Policy and agrees to abide by this policy.
- The teleworker will carry out the steps required for information security, and has familiarized him/herself with Town information security requirements and procedures. The teleworker agrees to consult with his/her supervisor when security matters are an issue.

This arrangement expires in one year and must be renewed to continue participation in the Town of Fairfax Telework Program.

Initials: Teleworker _____ (Date) _____ Manager/Supervisor _____ (Date) _____

V. Work Station Arrangement

(Check here if you will NOT be using computer equipment and skip to Section VI.)

A. Positioning When Seated

Yes No

- | | Yes | No |
|---|--------------------------|--------------------------|
| 1. Are your forearms and wrists parallel to the floor and upper arms resting at your sides when positioned at the keyboard or work surface? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Are your thighs parallel to the floor? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Are your feet supported? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Is there at least 2 inches of clearance between your thighs and the working surface? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Is there space, approximately the size of a fist, between the edge of the seatpan and the back of your knees? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Is the top of the monitor at a comfortable height (<i>i.e. no tilting of the head back or downward</i>)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Is the monitor screen at a comfortable distance from your eyes when in use (<i>i.e. you don't have to lean forward or backward to see the text on the screen</i>)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Does your head and neck rest in a neutral position (<i>i.e. facing forward, chin slightly down, shoulders relaxed</i>)? | <input type="checkbox"/> | <input type="checkbox"/> |

B. Chair Adjustment

Yes No

- | | Yes | No |
|--|--------------------------|--------------------------|
| 1. Is the height of the chair adjusted to allow you to sit in a neutral position (<i>see your safety officer for a definition of this position</i>)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Is the backrest of your chair supporting the curve of your lower back so that your spine is slightly arched? | <input type="checkbox"/> | <input type="checkbox"/> |

C. Foot Support

Yes No

- | | Yes | No |
|---|--------------------------|--------------------------|
| 1. Are your feet comfortably on the floor or a footrest? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. If a footrest is used, does it allow you to sit in a correct neutral position at your work station? (<i>skip to D if a footrest is not used</i>) | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Is the footrest non-restrictive to allow for leg movement and easily removable? | <input type="checkbox"/> | <input type="checkbox"/> |

D. Video Display Terminal (VDT) Screen/ Monitor

Yes No

- | | Yes | No |
|---|--------------------------|--------------------------|
| 1. Is your monitor placed to avoid glare caused by light sources? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Is your screen angle and/or brightness and contrast controls adjusted to reduce glare? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Is your screen clean and free from dust and smudges? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Is your screen adjusted for good image contrast and brightness? | <input type="checkbox"/> | <input type="checkbox"/> |
-

ATTACHMENT C – SETTING UP AN IN-HOME OFFICE

In setting up a home office, select a location that is safe, efficient, and comfortable. Observe "travel patterns" in and around the work area and avoid high traffic areas.

The main considerations in designing an in-home office are:

Desk

Your desk should be sturdy and able to handle the weight of any peripheral equipment (computers, printers, fax machines and/or telephones).

- Conventional desks are typically 29" high.
 - Computing surfaces are usually 26" high.
-

Chair

Your seat should be adjustable, including the headrest.

- Height of top of seat to floor should be between 15 and 25 inches.
 - Back tilt on chair/lumbar support should be 15 degrees.
-

Lighting

Your work lighting should be directed toward the side or behind the line of vision.

- Bright light sources can bounce off working surfaces and diminish the sense of contrast.
 - Northern daylight is optimal for both the office and operating a computer.
-

Electricity

You should have enough electrical outlets in the room to avoid overloading any circuits. If necessary, consult your local power utility.

1. To avoid tripping hazard, cover interconnecting cables or place them out of the way.
 2. Use a surge protector/master switch to connect electronic equipment, such as computers, monitors, printers and fax machines.
 3. Position equipment close to electrical outlets.
 4. Make sure electrical outlets are grounded.
-

Noise

You should avoid or keep distracting sounds to a minimum, such as the television or outside traffic or lawn mower sounds

- Diffuse unavoidable noise by shutting a door or using a room divider.
 - Use soft background music to keep productivity up and reduce boredom.
 - Note: no noise can be just as stressful as too much noise.
-

Protecting Data and Equipment

You must prevent costly computer breakdowns and the loss of crucial data by following these computer safeguards:

1. Position Equipment away from direct sunlight or heat sources.
 2. Place equipment on well-ventilated surfaces and provide for sufficient air space around them.
 3. Dust office space regularly.
 4. Do not eat or drink near valuable equipment.
 5. Never place food or beverages on your computer equipment, even temporarily.
 6. Do not touch unprotected floppy diskette or compact disk (CD) surfaces, set heavy objects on them, or expose them to heat, dirt, smoke or moisture.
 7. Keep all magnets, telephones, fluorescent lamps and electric motors away from computer equipment, floppy diskettes, and portable storage devices.
-

Safety

Review the "Safety Checklist/Acknowledgement," Attachment B.

ATTACHMENT E – CONSIDERATIONS FOR SELECTING TELEWORKERS

Many Town jobs contain tasks suitable for teleworking. Tasks that can be successfully managed in telework programs are those where the employee works independently handling information, including writing, reading, analyzing, telephoning, computer work and data entry.

The following considerations should be explored:

- ┌ Does the employee have the necessary knowledge to perform the required job tasks away from the office, or require input from others in the main office?
 - ┌ What portion of the employee's job is devoted to face-to-face contact with other agencies, the public or internal staff? Are there alternatives to needing this contact? Can this contact be structured to allow for communication via phone or computer, and if not, can it be redirected to the employee's planned non-telework days?
 - ┌ What portion of the employee's job requires the use of reference materials or resources located in the main office? Are these resources portable and able to be temporarily removed without interfering with the job performance of co-workers? Or are these resources available off-site through other means such as the Internet or a local library?
 - ┌ Will the employee's computer resources and software meet Town IT standards and allow for required productivity? Are there remote access hardware limitations? Does the Office have available resources to supply the employee with computing equipment?
 - ┌ What portion of the employee's job relies on access to photocopiers, fax capabilities or other specialized equipment? Can access needs, be met on non-telework days or can these needs, be serviced by a facility near the employee's telework office?
 - ┌ What portion of the employee's job uses confidential information? Can this information be secured in accordance with information security policies if taken or accessed off-site?
 - ┌ Can a variety of tasks that do not require information or equipment from the main office, be grouped and scheduled as telework? Can staff meetings and conferences be grouped and scheduled for non-telework days or accommodated with teleconferencing?
 - ┌ Does the employees' job involve fieldwork? Can trips begin or end at the employee's telework office rather than at the main office? Can associated paperwork be done away from the main office?
 - ┌ Is the employee reliable, responsible, self-directed and able to work independently in performing his or her work duties? Has the employee demonstrated the ability to establish priorities and manage his or her time? Does the employee require close supervision?
-

“The talk you hear about adapting to change is not only stupid, it’s dangerous.
The only way you can manage change is to create it.”
Peter Drucker...

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Section 2. About Telework and Telecommuting

Defined and Explained

An easy way to remember the meaning of *telework* or *telecommuting* is by dissecting the word(s). When thinking of related words such as *telephone*, *television*, *telegraph*, *telecommunications*, and *telework*, consider the “*tele*” part first. “*Tele*” means “. . . distant, remote, . . . at, over, from, or to a distance . . .” When linked to *commuting* and *working*, it translates to *commuting from a distance* and *working at a distance*.

The word *telecommuting* was earlier used to emphasize an ever-increasing need to reduce vehicular commute trips and the undesirable byproducts of traffic congestion. Among transportation professionals, *telecommuting* is considered as one of many transportation demand management strategies. As a transport strategy, *telecommuting* is only a part of a larger picture. Other parts include: office-space demand; environmental mitigation (air pollution and energy consumption); employee performance; business objectives; and quality of life.

With passing time, it became clear that the term *telecommuting* inadequately explained the broader spectrum of interests. As noted below, *telecommuting* is a form of teleworking. The term *telework* better expresses the broader interests missing in the term *telecommuting*. Because *telework* is more expressive and encompassing, and because it is the internationally recognized term—where *telecommuting* is not¹—*telework* has become the preferred globally accepted term. From business objective perspectives, *work* makes more sense than *commuting*.

Jack Nilles, who coined these terms, defines and makes these distinctions:

Teleworking: “ANY form of substitution of information technologies (such as telecommunications and computers) for work-related travel; moving the work to the worker instead of moving the workers to work.”²

Telecommuting: “Periodic work out of the principal office, one or more days per week, either at home, a client’s site, or in a telework center; the partial or total substitution of information technologies for the commute to work. The emphasis here is on *reduction or elimination of the daily commute* to and from the workplace. Telecommuting is a form of teleworking.”

Telework can also mean an arrangement that permits employees to work in or near their homes for all or part of the workweek. It can mean working at a project site or in a client’s office.

¹ *Commuting* is a term unique to the USA and is without a translated substitute in other languages. *Tele* linked to *work* has thus become the accepted international term for working at a distance, or working anywhere anytime.

² Nilles, Jack M., *Managing Work – Strategies for Managing the Virtual Workforce*, John Wiley & Sons, Inc., 1998.

Styles and Modes

Home-based telecommuting is the most commonly recognized form of telework. Another common term is *virtual office*, or working from anywhere anytime. Yet, there are other forms becoming accepted as effective practices in the public, government, and private sectors. The State of California has the opportunity to expand the conventional home office teleworking mode to other forms of telework. Other telework styles are:

Satellite Telework Centers are typical of a conventional office (owned or leased). A satellite office differs from the traditional office: “. . . *all of the center's employees work there because they live closer to that facility than to their regular or principal office, regardless of what their jobs are.*”³

Local and Neighborhood Telework Centers are similar to the satellite centers, except the employees of multiple organizations may perform their work in a somewhat traditional office environment.

Multiple Telework Sites offer a variety of work locations that the employee can vary by working at given times in the principal office, the telework center, or the home office. The multiple locations embrace the *Virtual Office* concept: “. . . a technology-based option for doing work away from the [*conventional*] office.”⁴

Office Hoteling “. . . is a concept of being able to call ahead to reserve a specific workplace.” “. . . Mobile workers are the primary candidates and they usually are found grouped together in specific divisions or departments. Teleworkers . . . are likely spread across all parts of the organization . . . “ It can mean reserving a specific work space for a specific time. ⁵

Office Moteling differs from Hoteling in that workspace is made available on a *first come, first served* basis.

Alternative Officing

Alternative officing are strategies for deciding office location and planning office space uses.⁶ They include:

Reengineered space

- Work schedule (flexible schedules)
- Modified office standards (better use of space)

On-premise options

- Shared space (two or more sharing space at different times)
- Group address (group or team space)
- Activity settings (setting to fit the individual or group)

³ Nilles, Jack M. *Managing Telework – Strategies for Managing the Virtual Workforce*, p. 13. Wiley 1998.

⁴ Gordon, Gil. *Gil Gordon & Associates*

⁵ Robertson, Ken. *Work Transformation – Planning and Implementing The New Workplace*, pp. 85 and 191. HNB Publishing 1999.

⁶ The California Department of General Services, Real Estate Service Division, is responsible for most state-owned and leased office facilities.

control; employee loyalty resulting from the trust to telework (related to results-oriented management); work environment; limited caregiving (e.g., elder care and sick child care); and home/family-work-leisure integration.

- ✓ Societal (Socioeconomic) – Reducing work-related traffic congestion; conserving transportation fuel energy; reducing air pollution; providing work opportunities for the mobility-restricted; decentralizing as a defense strategy against terrorism and disasters (natural and otherwise).

Detailed results of the pilot are in *The California Telecommuting Pilot Project Final Report, June 1990 (in PDF format)*. Highlighted among the prominent results were:

- Telecommuter work effectiveness fulfilled or exceeded expectations.
- Telecommuting enhanced the quality of work life for telecommuters, including those with disabilities and mobility restrictions.
- Results-oriented management techniques stressed in training sessions proved to be effective for managing and supervising both telecommuters and non-telecommuters.

Unexpected results of the California Telecommuting Program pilot included:

- Major capital investments were not necessary to implement successful telecommuting programs.
- A Governor's Executive Order was issued directing the program to expeditiously expand as part of a concerted effort to help offset California's mounting traffic congestion problems.
- A Governor's Executive Order was issued encouraging the use of telecommuting as an emergency response to the California earthquake of October 17, 1989.
- The states of Arizona, Colorado, Florida, Minnesota, Oregon, Virginia, and Washington initiated telecommuting programs based on the success of California's pilot.
- President George Bush (1992) incorporated telecommuting as part of the national transportation policy, attributable—in part—to the successful California program.
- Inclusion of telecommuting as a legitimate means for employers to comply with clean air programs administered by California Air Quality Maintenance Districts.
- The counties and cities of Contra Costa, Los Angeles, Sacramento, San Diego, San Bernardino, and others initiated telecommuting programs based on the resources and successes of California's pilot.

Two independent studies conducted in conjunction with the pilot produced favorable results. Total household automobile trips were reduced, rather than increased, as a consequence of having an additional auto available for use by other household members. In turn, potential air quality and energy conservation improvements were noted. Further, equitable means were developed for sharing office space and reducing total space requirements.

The Law

The State Employee Telecommuting Program became law September 30, 1990 and was later amended in September 1994.

Sections 14200-14203, *California Government Code*
Chapter 3
STATE EMPLOYEE TELECOMMUTING PROGRAM

§ 14200. Telecommuting

As used in this chapter, "telecommuting" means the partial or total substitution of computers or telecommunication technologies, or both, for the commute to work by employees residing in California.

§ 14200.1.

(a) The Legislature finds and declares the following:

- (1) Telecommuting can be an important means to reduce air pollution and traffic congestion and to reduce the high costs of highway commuting.

Telework Advisory Group (TAG)

Originally known as the Telecommuting Advisory Group (TAG), it serves as a forum wherein information about telework and related subjects could be exchanged.

TAG originated in 1984 as a policy-steering committee composed of mid-level managers representing an array of State entities. It was originally created to advise the Department of General Services (DGS) in planning, executing, and evaluating a two-year pilot telecommuting program. The results of the two-year pilot (1988–1990) were reported to the Governor and Legislature in July 1990. In turn, the report resulted in the enactment of legislation creating the *State Employee Telecommuting Program* (*California Government Code* Sections 14200–14203). Language in the *Code* charged DGS with the responsibility of establishing a telecommuting unit with several duties, including facilitating and leading the TAG. In a May 1996 Memorandum of Understanding, the Telecommuting Unit was transferred from DGS to the Department of Personnel Administration (DPA).

Legislation amending the *State Employee Telecommuting Program* was enacted in September 1994, calling for State departments, boards, and commissions to investigate and initiate plans to innovate the telecommuting work options. TAG serves as a forum for the exchange of information about how to plan, execute, and evaluate telework programs.

State agencies, local government, and public members are welcomed to proactively participate with TAG. Because telecommuting and telework involves issues of interest to many disciplines, it is common to have several representatives from a single agency. The Telework Program Consultant assigned to DPA maintains a membership roster and provides direction and leadership for TAG.

Normally, TAG convenes three to four times during a calendar year. Depending upon contemporary interests and issues, agenda items will vary and might include emergency preparedness planning, labor/management relations, information technology, and related management and nonmanagement issues. Meeting objectives focus on information exchange, problem solving, and opportunities for program enhancements.

Future efforts of TAG include establishing a database for program evaluation, creating and implementing a telemanagement incentive program, and providing training and educational links to telework resources.

Other California state agencies in various stages of creating or executing telework programs are:

California State Government Entities
with or actively creating
Formal Telework Policies and Programs
January 2002

- | | |
|---|---|
| 1. Aging, Department of | 29. Health Services, Department of, Med-Cal Fraud Inspection Unit |
| 2. Air Resources Board | 30. Health and Welfare Data Center |
| 3. Alcohol and Drug Programs, Department | 31. Highway Patrol, California |
| 4. Attorney General, Department of Justice, Legal Division | 32. Housing and Community Development, Department of |
| 5. Community Colleges, California, Office of the Chancellor | 33. Information Technology, Department of |
| 6. Community Services and Development, Dept of | 34. Integrated Waste Management Board, California |
| 7. Conservation, Department of | 35. Justice, Dept of, Hawkins Data Center |
| 8. Consumer Affairs, Department of | 36. Lands Commission, State |
| 9. Education, Department of | 37. Library, State |
| 10. Emergency Services, Governor's Office of | 38. Lottery Commission |
| 11. Employment Development Department | 39. Mental Health, Department of |
| 12. Energy Commission, California | 40. Military Department |
| 13. Environmental Protection Agency, Office of Environmental Health Hazard Assessment | 41. Motor Vehicles, Department of |
| 14. Equalization, Board of | 42. Parks and Recreation, Department of |
| 15. Finance, Department of | 43. Peace Officer Standards and Training, Commission on |
| 16. Financial Institutions, Department of | 44. Personnel Administration, Department of |
| 17. Fish and Game, Department of | 45. Pesticide Regulations, Department of |
| 18. Food and Agriculture, Department of | 46. Public Employees Retirement System, California |
| 19. Forestry & Fire Protection, Department of | 47. Public Utilities Commission, California |
| 20. Franchise Tax Board | 48. Rehabilitation, Department of |
| 21. General Services, Department of, Office of the State Architect | 49. Social Services, Department of |
| 22. General Services, Department of, Division of Procurement | 50. State Compensation Insurance Fund |
| 23. General Services, Department of, Office of Small & Minority Business | 51. State Personnel Board |
| 24. Health Services, Department of | 52. Statewide Health Planning and Development, Office of |
| 25. Health Services, Application Support Unit, Licensing and Certification Program | 53. State Public Defender, Office of |
| 26. Health Services, Department of, Division of Aids | 54. Teale, Stephen P. Data Center |
| 27. Health Services, Cancer Detection Branch | 55. Toxic Substance Control, Department of |
| 28. Health Services, Department of, Laboratory Services Branch | 56. Transportation, Department of |
| | 57. Unemployment Insurance Appeals Board |
| | 58. Water Resources, Department of |
| | 59. Water Quality Control Board |
| | 60. Youth Authority, Department of |

in areas where telecommuting is identified as being both practical and beneficial to the organization. The Department of Personnel Administration is assisting State agencies with this effort.

An array of 60 State government agencies are either currently involved with telework programs or in program planning phases. Collective bargaining units and labor relations officers are continuing to incorporate telework program language into collective bargaining agreements.

Management and supervisory skills for managing remote work.	On-site seminars and workshops tailored to an organization's needs. (See also State Training Center telework courses #370.)
Program planning, implementation, and evaluation guidance.	In-depth, experienced and on-site consulting to support your program planning, execution, and evaluation.

The three phases for creating a telework program are: Planning, Executing, and Monitoring and Evaluating. Each phase comes with a series of suggested activities and tasks.

Phase 1 – Planning

- 1.1 Identify the need(s) a telework program will solve. What problems will telework help solve, including business, personal/employee, work/family arrangements, quality of life, environmental, etc.? Business objectives, stated clearly, are critical for employer and management support.
- 1.2 Identify stakeholders, those who are affected by the possible inputs and outcomes of a telework program, including customers, clients, non-teleworking co-workers, unions, and others who could be favorably or adversely impacted.
- 1.3 Recruit and organize a core planning team consisting of disciplines having an influence on the success of the program, including the human resources, legal counsel, information technology, and facilities managers; risk management specialists; labor relations officers; and union representatives.
- 1.4 Develop a brief mission statement with clearly and concisely stating the goals and objectives. This, in turn, lends management credibility and direction to the organization and the core planning team's efforts.
- 1.5 Inventory resources, barriers, and potential issues. An early understanding of the scope and limitations helps focus the work tasks where special attention is demanded.
- 1.6 Prepare executive briefings and orientations for both management and nonmanagement with the objective of providing information upon which informed decisions can be made to participate or not.
- 1.7 Convene an executive steering committee for the purpose of resolving issues and moving through impasses. Although completed staff work will avoid the need of executive-level intervention, its presence can provide the impetus for moving through road blocks to implementation.

Section 5. Consultation—Training—Resources

This section offers an array of resources about telework and telecommuting, beginning with options for consultation and training and an archive of the State of California historical telework documents for those interested in the history and evaluation of the telework program. The archived information has been of interest to news media and to students preparing academic papers relating to policy and telework program history and progress. A list of publications is offered as assistance to those seek in-depth program information from the perspective of potential teleworkers, telemanagers, and telework program coordinators. Many of these resources are linked to other useful telework and telecommuting sources.

Consultation and Training Resources

The Department of Personnel Administration (DPA) offers training and assistance to managers, supervisors, and program coordinators, potential teleworkers and non-teleworking co-workers. For additional information please visit the "[Non-governmental telework/telecommuting resource links](#)" on DPA's website.

These services can be customized to accommodate and reflect the distinct organizational culture of your State agency and delivered at your work site.

Option 1: Telework Program Planning and Management

This is a workshop for individuals who are, or could be, responsible for planning, developing and executing telework programs. The focus is on a *design for success* program with an interactive format, requiring participants to draw upon their experience with and knowledge of their organizational culture.

Option 2: Teleworker "Need-to-know-about-Telecommuting-before-I-decide"

For general information about telecommuting and telework, please see Section 2—About Telework and Telecommuting (page 2) and Section 4—Creating a Telework Program (page 15). Orientation briefings can be arranged.

Option 3: Telemanager and Teleworker

This is for managers and employees who have **already** decided to participate in a telework program. This interactive program is focused on preparing the telemanager and the teleworker for a successful telework experience. Roles, responsibilities and concerns of the teleworker and telemanagers are discussed with a view toward finding options to avoid problems and enhance opportunities. Attendance of the teleworker and the supervisor is *required*.

Option 4: Do It Yourself External Training Resources

The 5-state Telework Collaborative (including California) has developed educational and training resources as stand alone aids for training officers and telework program coordinators and teams.

Resources

Federal and State

Arizona, California, Oregon, Texas and Washington consortium.
Telework Collaborative

State of California – Work & Family Program
State of California - Computer User's Handbook (in Acrobat PDF format.)

Telecommute Connecticut

US General Services Administration (GSA)
Telework Program

Associations

Bay Area Telework Association (BATA – San Francisco region)
International Telework and Advisory Council (ITAC)
Metro Atlanta Advisory Council (Atlanta region)

Non-government telework/telecommuting resource links

Gil Gordon Associates
InnoVisions Canada
InteleWorks
JALA International, Inc.
June Langhoff's Telecommuting Resource Center
KLR Consulting
Legato Consulting
New Ways to Work
TAO Emergency Management Consulting
Telecommuting Safety & Health Benefits Institute
WorkOptions.com

Books

The Law of Telecommuting by Nicole Belson Goluboff, 2001. American Law Institute, American Bar Association, Committee on Continuing Professional Education.

Managing Telework – Strategies for Managing the Virtual Workforce by Jack M. Nilles, John Wiley & Sons, Inc. 1998.

The Telecommuter's Advisor: Real World Solutions for Remote Workers by June Langhoff, Aegis Books, 1999.

Telecommuting Success: A Practical Guide for Staying in the Loop While Working Away from the Office by Michael Dziak, Jist Works, 2002.