



U.S. Department of  
Transportation

# Telecommuting: Moving the Work to the Workers

September 1991

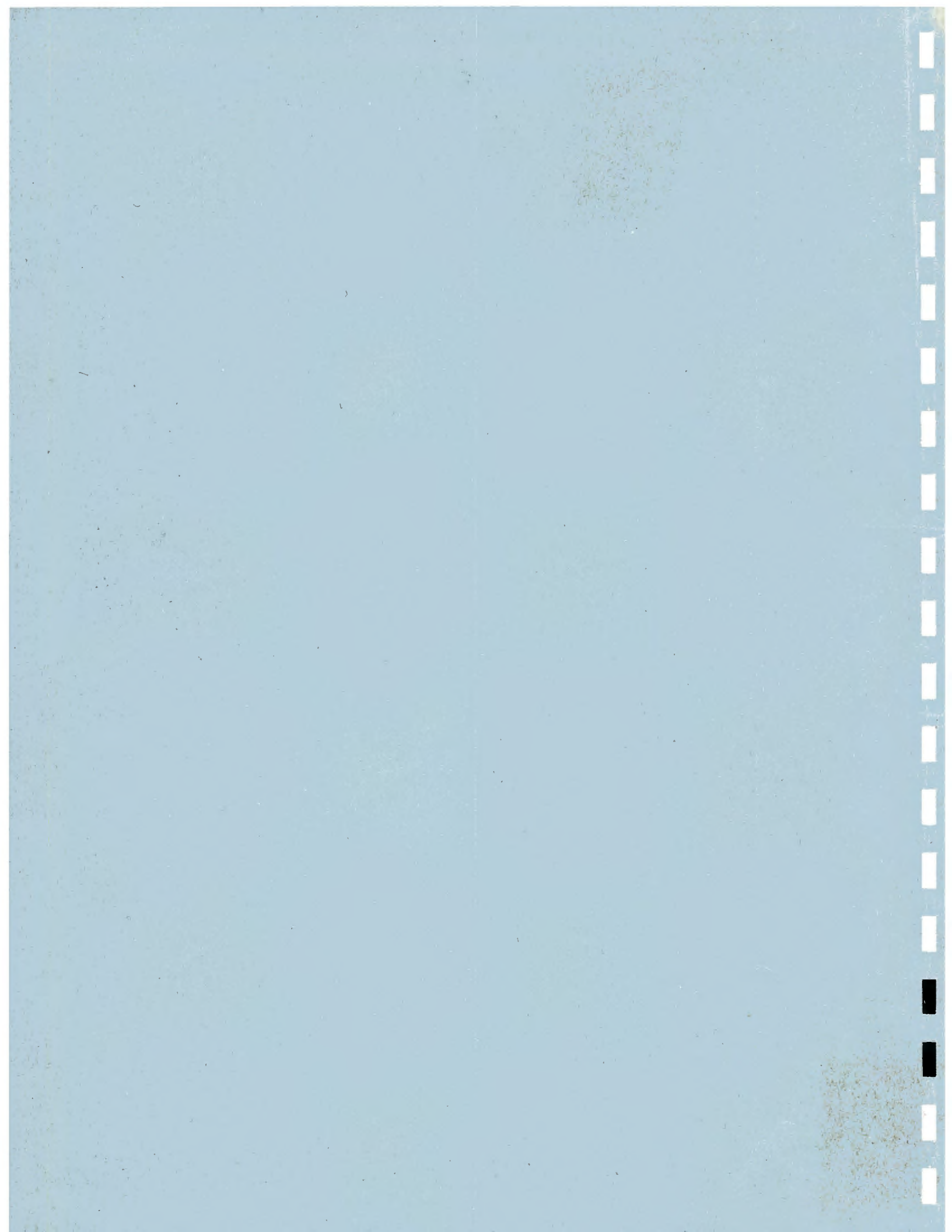
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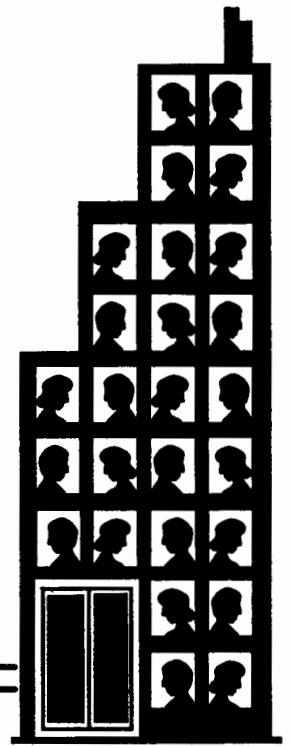
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# Telecommuting: Moving the Work to the Workers



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A Handbook  
to Help You  
Set Up a  
Program  
at Your  
Company





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■ <b>Introduction</b>	
What is Telecommuting? .....	<i>i</i>
■ <b>Section 1: About Telecommuting</b>	
Where People Telecommute .....	<b>1</b>
Why People Telecommute .....	<b>2</b>
What's In It for Your Company .....	<b>2</b>
Other Company Considerations .....	<b>4</b>
What's In It for Your Employees .....	<b>5</b>
Related Employee Concerns .....	<b>6</b>
Impacts on the Community .....	<b>6</b>
■ <b>Section 2: Program Design</b>	
Overview .....	<b>7</b>
Where to Start in Your Organization .....	<b>7</b>
Gather Support .....	<b>7</b>
Select a Telecommuting Coordinator .....	<b>8</b>
Form a Steering Committee .....	<b>9</b>
Develop Policy .....	<b>10</b>
Estimate Costs and Savings .....	<b>14</b>
Hold Briefing Sessions .....	<b>15</b>
Select Telecommuters and Telemanagers .....	<b>15</b>
Write a Telecommuter's Agreement .....	<b>18</b>
■ <b>Section 3: Implementation</b>	
Overview .....	<b>21</b>
Training Session A: Telecommuters .....	<b>21</b>
Training Session B: Telemanagers .....	<b>25</b>
Training Session C: Training for Telecommuter-Telemanager Teams .....	<b>27</b>
Monitoring and Evaluating .....	<b>33</b>
When Should You Offer Telecommuting Company-Wide? .....	<b>34</b>
■ <b>Section 4: Appendix</b>	
Resources: Telecommuting Videos .....	<b>37</b>
Resources: Tapes or Transcripts of National and Local TV/Radio Broadcasts .....	<b>38</b>
Resources: Annotated Bibliography .....	<b>39</b>
Resources: Programs and Contacts .....	<b>42</b>
Case Study: Pacific Bell Corporation .....	<b>44</b>
Case Study: The County of Los Angeles .....	<b>44</b>
Case Study: Hawaii Telework Center .....	<b>45</b>
Case Study: The State of California Pilot Project .....	<b>46</b>
Sample Telecommuting Policy .....	<b>48</b>
Sample Telecommuting Agreement .....	<b>50</b>
Sample Telecommuter's Assignment .....	<b>54</b>
Answers to Common Telecommuting Questions .....	<b>56</b>
Selection Survey for Employees .....	<b>59</b>
Selection Survey for Supervisors .....	<b>63</b>
A Note on Computer Viruses .....	<b>67</b>
Setting Up a Home Office .....	<b>69</b>
Safety Issues .....	<b>71</b>
Telephone Etiquette .....	<b>72</b>
Scheduling .....	<b>73</b>

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## Introduction

### ***Is a Telecommuting Program Expensive?***

### ***Where Do We Begin?***

### ***How to Use this Handbook***



Simply defined, telecommuting is working at home or at an office close to home, full or part-time. While employees may be hooked up to the main office via a sophisticated computer network, it's possible to telecommute with as little as a pen, paper and phone. Imagine putting in a full day's work without ever getting into your car!

You *will* incur costs at first. How much depends on how big a leap you make into telecommuting. Many companies start out on a shoestring, cutting costs by requiring telecommuters to use their own equipment at home and having someone already on-staff manage the project. Of course, the larger your expectations are, the more costly your telecommuting program will be.

The good news is: even moderate investments in computers, telephones, planning, etc., are usually offset by increases in employee productivity. *(But more on that later...)*

We suggest that you start by offering a "prototype," a mini-version of what you'd eventually like your telecommuting program to be. A prototype lets you work out any bugs in your program before it goes company-wide. Start by offering telecommuting to just one department or a select group, for example.

Some companies also run "pilot" projects—offering telecommuting for a specified amount of time (a year, for example) so they can perform an in-depth study before deciding whether to continue. You may not need to conduct a pilot. Instead, you can rely on what was learned by the State of California, County of San Diego, Southern California Association of Governments, AT&T and Pacific Bell in their pilot studies. (For more information and results of specific pilot programs, see *Case Studies*, pp. 44–47, or contact organizations listed under *Resources: Telecommuting Programs and Contacts* in the appendix of this handbook.)

This handbook is divided into four sections—introduction to telecommuting, program design, implementation and appendices—to help you develop an effective program. Keep in mind, the suggestions made in this handbook are just that: *suggestions*. You'll want to adapt them to suit the size and style of your company.







# About Telecommuting

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- *Where people telecommute*
- *Why people telecommute*
- *What's in it for your company*
- *Other company considerations*
- *What's in it for your employees*
- *Related employee concerns*
- *Impacts on the community*



## Where People Telecommute

### At Home

### At Satellite Work Centers

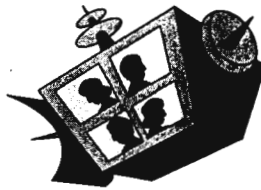
### At Neighborhood Work Centers

Telecommuting is fast changing the way that people do business. Instead of just being a place where people *go*, work is now something that they *do*. Here's where:

## About Telecommuting

### ■ Where people telecommute

Currently the most popular option, this involves little or no outlay in time or cash for employers and scores high with employees. This handbook will help you set up home telecommuting. But there are also two other kinds:



Often confused with "branch offices," satellite work centers differ in one important respect: all the people who work at them also live near them. For example, if a company in downtown Los Angeles sets up a satellite work center in the inland area, only people who reside in that area would work there—regardless of where their supervisors or other department members work.

Similarly, neighborhood work centers provide an opportunity for employees to work closer to home—in this case, in office facilities with employees of other firms. Tenants in a neighborhood work center usually share support services, such as clerical help, telecommunications equipment, photocopying machines and office supplies.

There are at least three neighborhood work centers in operation in the United States: the Washington State Telework Center and the Ballard Neighborhood Telework Center, both in Washington state, and the Hawaii Telework Center (see *Case Study: Hawaii Telework Center*, pp. 45–46).

Many experts believe that we'll soon see more satellite and neighborhood work centers. In Japan, where housing is at a premium, telecommuting is already almost entirely satellite and neighborhood work center-based.

Although more difficult and costly to set up, work centers are easier to sell in concept to management—perhaps because they more closely resemble the traditional office.



Satellite and neighborhood work centers also have the potential to solve the growing jobs/housing imbalance problem that many communities are facing by moving the jobs closer to where the employees live.

---

## **Why People Telecommute**

Perhaps the main reason people are telecommuting now is simply because they can. In the United States, 5.5 million people telecommute, consisting of company employees working at home, on part time or full time basis.

Jobs are more portable than they once were. The US used to be largely an industrial nation. In fact, in 1950 only 17 percent of workers were in information or service businesses like sales, public relations, personnel, banking, health-care and publishing. By 1980, that number grew to more than half—and it's expected to jump to three-quarters of all workers by the end of this decade.

Also, while not essential, computers and other hi-tech communications equipment can make telecommuting easier. Employees who use personal computers at the company can just as easily use them at home. And telecommuters can now keep in touch via such innovations as facsimile machines, electronic mail and voice mail.

While these factors may make it possible to telecommute, others may make it necessary. Some of the changes in our lifestyles that are dictating a need for change in our work styles:

### ***The New American Family***

The standard "nine to five" schedule was designed around a traditional family that doesn't exist anymore. Picking up and dropping off small children at day-care, arranging after school care—or even handling the growing demand of elder care—cause many employees to need more flexibility in their schedules. While telecommuting is not a substitute for child care, it can allow some workers much-needed freedom.

### ***Increased Cost of Housing***



In their search for affordable housing, people are moving further from the cities—and from their work sites. They face longer commutes and often wind up searching for work closer to home. Telecommuting can ease the strain of commuting long distances every day. It is a viable option for a firm when it is faced with the possible loss of key employees because of increased local housing costs.

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## **What's In It for Your Company**

When your company offers telecommuting as an option, everyone wins—including the company. Researchers find again and again that a well-designed telecommuting program can help boost a company's profits by improving job performance.

Many managers may fear that once their workers are out of sight, they'll neglect their duties. On the contrary, studies show that telecommuting actually increases employee productivity.

- Link Resources, a research and consulting firm, reports that telecommuting can increase productivity by roughly 20 percent.

**What's In It for  
Your Company**  
(continued)

- Research on a Control Data telecommuting program found that its employees' productivity rose 15 to 25 percent.
- Telecommuters and their supervisors in the Southern California Association of Government's (SCAG) pilot telecommuting program felt that both the quality and quantity of work produced were higher when working at home than when working at the office.

**About Telecommuting**

- *Why people telecommute*
- *What's in it for your company*



Employees are less likely to be distracted at home than in the office. Both SCAG and Pacific Bell found that employees faced fewer distractions at home than they did at the office. Telecommuters have more continuous work time, can use once non-productive commute time, and can work at personal "peak" times instead of being herded into a standard "nine to five" schedule.

They are also less stressed. Studies show that the drive to work can sap employees of energy, even as much as two hours after the commute.

**Reducing Absenteeism**

Telecommuting can reduce illness caused by stress. Also, in the case of emergencies such as a sick child or car breakdown, a telecommuter can take care of the problem and spend the rest of the day working, instead of calling in sick.

**Improving Recruiting**

Telecommuting programs enable firms to recruit from a wider audience, tapping into new labor pools such as the physically-impaired, the elderly and geographically-remote employees.

**Keeping Good Employees**

Faced with long, stressful commutes to and from work each day, employees may look for employment closer to home. By allowing them the option of avoiding this commute, telecommuting can help employees stay on the job.

Also, because employees view telecommuting as a job benefit, morale and motivation are increased. Job turnover, and therefore recruitment costs and training expenses, are reduced. Telecommuting also increases flexibility in accommodating employee needs during pregnancy or relocation.

**Reducing Overhead  
Expenses**

Employees who telecommute can share offices and use them on alternate days. Firms can invest in less-costly office space in outlying areas to create satellite offices. Fewer parking spaces are needed as well. These benefits can add up to significant savings.

(It is important to note, however, that telecommuters are not independent contractors. It is considered a form of exploitation to treat them as such because independent contractors are not paid FICA and other benefits due to an employee. It is also against the law. The Internal Revenue Service can—and will—fine firms that do this.)



---

## **Mitigating Disruptions in a Disaster**

Employees' home offices become management's hidden asset when an emergency occurs. Telecommuting helped get the newspaper out after a fire at the *Dallas Times Herald*. It also kept people at the California State Public Utilities Commission working productively at home after the big San Francisco earthquake. SCAG used telecommuting when a building had to be evacuated for asbestos removal.

## **Air Quality/Transportation Regulations**



In many areas, air-quality regulations require employers to file trip-reduction plans. The purpose of these plans is to help cut traffic and smog by placing the responsibility on employers to find ways to decrease the number of autos that go to and from a work site every day. In the South Coast Air Basin, for example, Regulation XV is the driving force behind telecommuting. Rule 210 is a similar ordinance in effect in Ventura County.

Telecommuting, along with ridesharing and alternative work schedules, helps employers comply with these regulations. Many firms adopt telecommuting as part of their plan because it's something they're already doing. They sometimes let employees work at home, but have never called it telecommuting. Now, employers are formalizing such programs to receive credit in their trip-reduction plans.

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## **Other Company Considerations**

Improper planning can be the death of even the most well-intentioned telecommuting program. Even if you're only allowing a few employees to occasionally work at home, you must consider:

### **Management Style**

Supervisors must learn to evaluate performance by the quality, quantity, and timeliness of tasks or projects completed—not by the actual monitoring of work hours.



- The County of Los Angeles trains its supervisors of telecommuters ("telemangers") to manage by results, and encourages frequent communication to ensure that tasks and performance expectations are clearly defined. If an employee fails to

meet goals, he or she may lose the privilege to telecommute. (See *Case Study: County of Los Angeles*, pp. 44–45.)

### **Resistance—In-House and Union**

Telecommuting may sound scary to some employees—especially managers who'll need to adapt the way they supervise workers.

## Resistance (continued)

## Start-Up and Operating Costs

## Decisions, Decisions, Decisions...

Also, some unions are wary of telecommuting, so consider union policies when planning a telecommuting program. It may help to include union representatives in the program design.

If you're running a formal program, you'll incur costs for personnel to train and select telecommuters, for equipment and perhaps even for additional space for a satellite office.

It's a lot of work, from gathering management support to running the program day-to-day. Most companies appoint one person (typically the employee transportation coordinator) to handle the details.

### About Telecommuting

- *What's in it for your company*
- *Other company considerations*
- *What's in it for your employees*

## What's In It For Your Employees

### The Benefits

Most employees regard telecommuting as a major benefit. The following are some of its selling points:

- **Steering clear of traffic.** By working at home, or closer to home, employees skip having to drive—and all the expense, time and frustration that goes along with it.
- **Increasing flexibility.** They're freer to choose their own hours. Also, because telecommuters don't have to drive to work every day, they may have more options deciding where they want to live.
- **Work environment.** Quite simply, no one is telling them how to work. Do they prefer a messy desk? Comfortable clothes? Background music? The office usually sets these standards, unless the office is at home.
- **Saving money.** Because they're not driving to work every day, telecommuters can save up to thousands of dollars on gas, car maintenance and depreciation. They're also likely to spend less on work attire and lunches.
- **Getting...and staying...on the job.** Telecommuting may be the only means of acquiring a job for the mobility-limited or physically-impaired. Pregnant employees or those who are relocating may be able to continue working longer if they can telecommute.
- **Easing child care and elder care problems.** Telecommuting can make it easier for working parents to manage child care arrangements. It is not, however, a substitute for child care. A parent cannot work and care for a child at the same time. Generally, this causes both jobs to suffer.



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**What's In It for Your  
Employees**  
(continued)

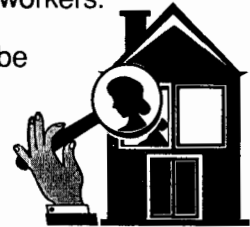
However, a parent could hire a baby sitter to attend to a child's immediate needs while he or she works. Also, by eliminating the time spent traveling to the office, telecommuters may no longer need child care for school-age children. For example, a parent working at home could start working at 6 a.m. while the other parent got the children off to school, and then could be finished with his or her work by the time the children got home.

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**Related Employee  
Concerns**

Telecommuting is not suitable for every employee. Some of their chief concerns:

- **Maintaining ties with co-workers.** How will the company keep employees "in the loop?" How will they keep comraderie high? Many companies schedule telecommuting on a part-time basis only. This way, the telecommuter can still attend meetings with co-workers.
- **Staying visible.** Many employees fear that they'll be forgotten when it comes time for a raise or promotion. Studies show that this is simply not the case, especially with part-time telecommuting.
- **Managing living space.** Telecommuters need to have some working space set aside, but usually the amount needed is small: a portion of a room or the garage, for example. The home office should, however, be as separate as possible from family living areas. This is particularly important if there will be other people at home during working hours.
- **Higher bills.** Costs such as electricity and water can increase with telecommuting.
- **Separating work and home.** Telecommuters may wonder if they are expected to take care of household chores because they are home all day. Friends, family and neighbors may often call to chat. Telecommuting can also aggravate tendencies toward "workaholism," especially for professional employees.



Properly training telecommuters and their managers can help ease this problem.

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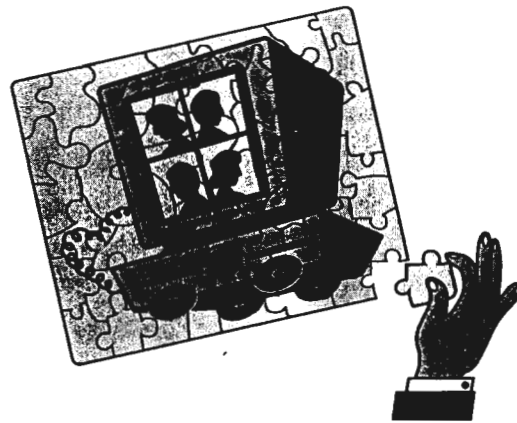
**Impacts on the  
Community**

Large-scale telecommuting would mean...

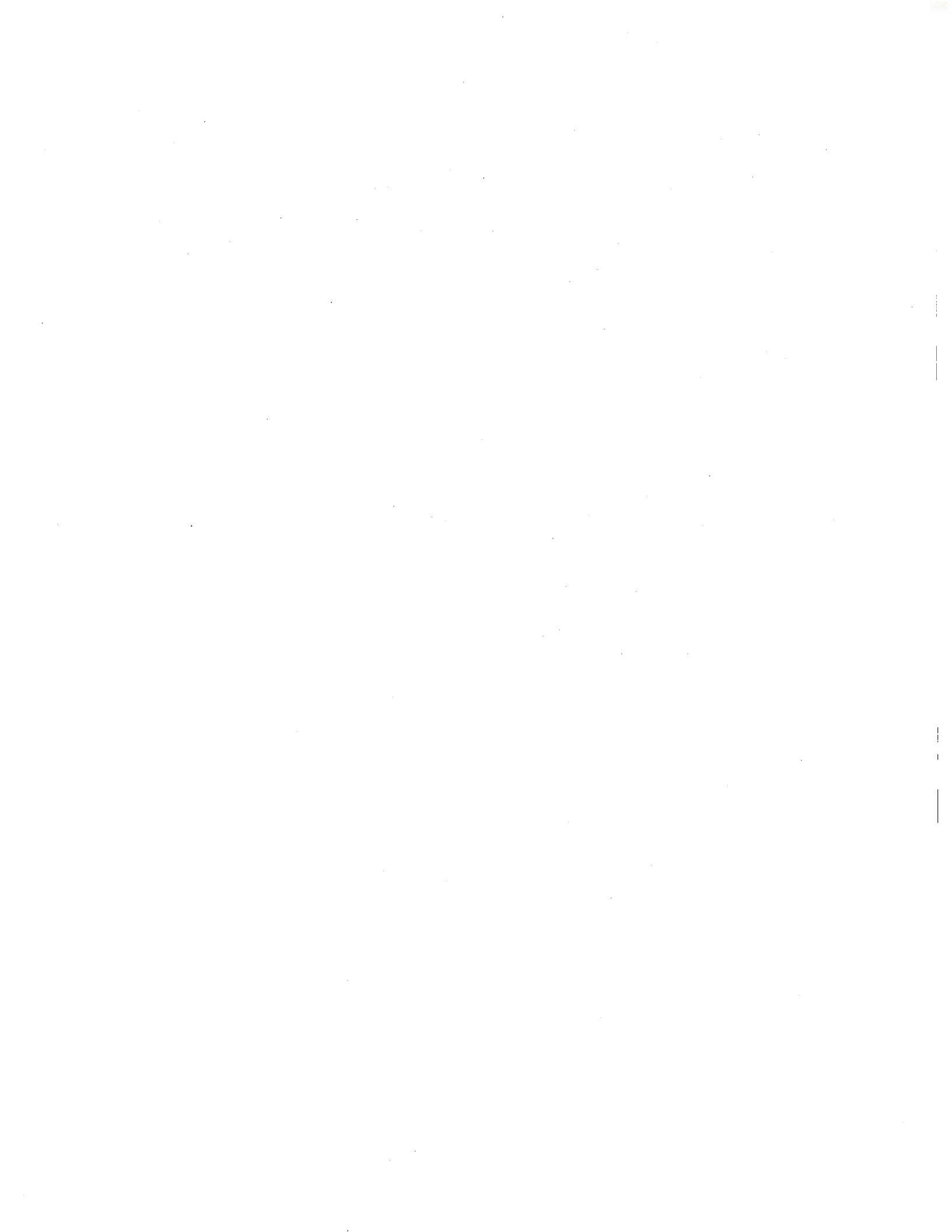
- We'd have less traffic, less smog and use less fuel. In fact, if everyone worked at home just one day a week, we'd cut traffic by as much as 20 percent. We could re-think where we live and work. On the positive side, telecommuting would allow us more flexibility in choosing to move jobs to outlying areas where housing is more affordable but jobs are more scarce. Telecommuting can bring economic development opportunities to small towns, reducing the necessity to move to the big city because "that's where the jobs are."

# Program Design

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- *Overview*
- *Where to start*
- *Gather support*
- *Select a telecommuting coordinator*
- *Form a steering committee*
- *Develop policy*
- *Estimate costs and savings*
- *Hold briefing sessions*
- *Select telecommuters and telemanagers*
- *Write a telecommuter's agreement*





## Overview

In this section, we outline how to design your telecommuting program—from drumming up support to handling legal issues. The process we recommend is quite formal and you may opt for a more casual approach. Be sure, though, that you don't entirely neglect any of the steps covered. After all, the idea of a prototype is to provide a solid foundation; it must be strong so that you can continue to build on it.

### Program Design

- Overview
- Where to start in your organization
- Gather support

## Where to Start in Your Organization

Which groups in your company don't require constant face-to-face interaction with customers or other employees? Which have field people who could go directly from home to customers and back? You may not have all of the departments listed below or a written organization chart. But even the smallest business has bills to pay and telephone sales calls to make. Both tasks can be done from a home office. Look for departments in your firm that have tasks like these:

### Typical Telecommuting Tasks

- Administrative Offices
- Marketing & Sales
- Human Resources
- Production
- Purchasing
- Information Services
- Service
- Research & Development
- Accounting

Handwritten letters and reports processing  
Credit evaluations, sales calls, follow-up  
Market research, advertising, and sales  
Computer programming  
VLSI design, graphics  
Telephone order processing, program, training  
Telephone applications, customer service, calls  
Data research  
Writing proposals, data reports, user guides, manuals  
Check data, billing, mailing, collections

## Gather Support

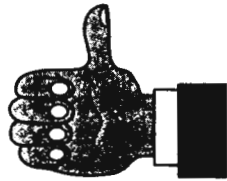
### Convincing Upper Management

When you are first starting the program you may not need everyone's support, so go for the easiest successes at first. It will probably require a combination of group presentations and one-on-one meetings.

You'll most likely need the "thumbs up" from this group before you move ahead on a telecommuting program. Upper managers usually wonder, "How does it affect the company's bottom line?" These are the people who want to know how telecommuting can save a company money, increase productivity—and all the other benefits detailed in Section One of this handbook.

Don't overlook the fact that telecommuting qualifies as a trip-reduction strategy. This may be the biggest selling point for companies that must comply with air-quality regulations.

## **Convincing Middle Managers**



Middle managers are usually the hardest group to convince of the merits of telecommuting. They generally wonder, "How does it affect me?" The truth is that telecommuting may change how they manage their workers. Often it's for the better. Telecommuting teaches managers to focus on the quality, quantity and timeliness of the work product, rather than on the process the telecommuter used to achieve the end result. (We will explore how to "manage by results" later in this handbook.)

Some other ways to endear middle managers to the idea of telecommuting:

- Meet informally with managers. Use these meetings to familiarize them with telecommuting—and also to get their input on how to tailor the program to best suit each department's needs. Managers are more likely to support a program they had a hand in designing. (For more information on briefing sessions, see page 15.)
- Remind them that you're starting with a prototype program. They can always withdraw if problems arise.
- Focus your energy on persuading those who are open-minded. Some managers may already let employees work at home on an informal basis, and their support can be invaluable. Keep in mind that some people will never voluntarily go along with the program. Others may withhold judgement until they see that the program is a success.

## **Convincing Employees**

This is usually not a problem. At many work sites, 80 to 90 percent of the employees are willing to telecommute part-time. At first you may want to limit participation to a manageable number (about 10 percent of your organization's total population).

## **Select a Telecommuting Coordinator**

You may already have been designated as the telecommuting coordinator. If not, you need to select or hire a spokesperson for the project. This person is usually—although not always—the employee transportation coordinator. The size of the task may call for the talents of a full or part-time employee for a year, or just be another duty handled by someone already on-staff.



A telecommuting coordinator champions the concept of telecommuting and must have the support of the CEO and people throughout the company. It's often the telecommuting coordinator's job to:

- Sell the program constantly.
- Make presentations.
- Recruit supporters who will help spread the word.

**Select a Telecommuting Coordinator**  
(continued)

- Become a telecommuting “expert.”
- Play a leadership role in fostering the program and setting time lines.
- Form a steering committee to plan and implement the program.
- Identify parameters and policies for telecommuting.
- Help select and train participants.
- Identify safety considerations.
- Prepare support materials such as brochures, manuals, videos, etc.
- Determine equipment policy for company-owned or telecommuter-owned equipment.
- Set a good example by telecommuting regularly.
- Form a telecommuter’s support group.
- Provide status reports to management and employees.
- Troubleshoot, evaluate and fine-tune the program.

**Program Design**

- *Gather support*
- *Select a telecommuting coordinator*
- *Form a steering committee*

**Form a Steering Committee**



What sort of equipment will you provide? Will telecommuters work at home or at a work center? What are the criteria for being a telecommuter? These are all decisions of the steering committee, a special group that develops the policies and procedures that ensure your telecommuting program is a perfect fit for your company.

The telecommuting coordinator usually chairs the committee and helps select its members. Many people consider it prestigious to be selected—especially if you can show them that the committee has the blessing of upper management. Make sure, however, that you don’t choose all “chiefs” but also a few “indians” who are the ones who actually carry out the committee’s plans.

In a larger firm, the steering committee is usually comprised of a representative from each department that will be participating in the telecommuting program. You may also want to invite staff from human resources, accounting, legal counsel, telecommunications and information systems, research, public relations and other departments. To help counter any

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**Form a Steering Committee**  
(continued)

resistance to telecommuting from the union or employee association, you may want to invite one of its members to join.

A small firm's steering committee may consist of two to three people who help you with planning.

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**Develop Policy**

**The Goals of the Program**



Your steering committee's first task is to develop a formal, written policy for the telecommuting program. This policy statement should outline:

Be specific. For example, do you want to improve productivity? Reduce absenteeism? Reduce commute trips? Your goals will explain why you're starting a telecommuting program and will help sell staff on the idea. (See *Sample Telecommuting Policy*, pp. 48-49.) Some firms even develop a mission statement and a logo for the program during this process.

**The Telecommuting Arrangement**

Most companies consider telecommuting to be a voluntary arrangement that may be terminated at any time by either the employee or the supervisor. Telecommuters do not lose any of their benefits, compensation, insurance, vacation and sick time just because they work at home.

**How Often People Can Telecommute**

Most companies let employees telecommute part-time (one to three days a week) at first. Some may eventually progress to full-time telecommuting, depending on the work they do.

If possible, your policy statement should allow telecommuters to work at any hour when they're at home. This gives employees a feeling that they're trusted and allows them to work when at their best. If you hesitate to give carte blanche on hours or need people to be available at certain times, designate core hours, such as 10 a.m. to 3 p.m., when the telecommuter should be working. In essence, you are merging flex-time with your telecommuting program.

Limiting telecommuters to regular office hours is an option, but extremely difficult to enforce. If your goal is to ensure that telecommuters are accessible, try setting expectations on how long you feel it should take them to return phone calls or another time-related restriction.

**Worker's Compensation and Liability**

There have been few, if any, legal tests of the applicability of worker's compensation to specific telecommuter's claims. However, the position of most employers, enforced through clauses in the telecommuter's agreement, is that employees are protected when they work within their work space in the home office and not when they are in the kitchen or in the yard. Ask your legal counsel for help in drafting your company's position on work at home and how it affects liability and worker's compensation.

## Resources

## Technology

Decide what resources you'll need for the telecommuting program, including funding and time commitment—for you and the steering committee.

What equipment you let telecommuters use will probably be based on the nature of their jobs and how often they work at home. Some companies provide no equipment but offer discounted rates through specific vendors.

Most companies pay for all of their telecommuters' work-related voice and data communications (phone calls included). Employees use company calling cards or submit original phone bills.

The following equipment could improve your telecommuting efforts:

- **Answering machines** are the minimum required by most companies. They allow telecommuters to get messages when they are on break or are too busy to take calls.



- **Voice mail**, an electronic phone answering system at the work site, is ideal for telecommuters because external callers can't tell that the telecommuter is not in the office. The telecommuter can pick up and return calls from any location.
- **Call forwarding** transfers calls coming into the work site to the employee's home. The on-site secretary can also pick up the call if the telecommuter does not answer.
- **Personal computers** are a necessity for most full-time telecommuters. Part-time telecommuters often don't mind using their own computers but may require help to make their PCs compatible with company equipment. If you're concerned that employees' personal computers may introduce viruses into the company system, equip your telecommuters with company-provided computers and software. (See *A Note On Computer Viruses*, pp. 67–68.)
- **Portable computers** allow telecommuters to take home a company computer on an as-needed basis.
- **Modems** can transfer documents between a home personal computer and the main office, other telecommuters or various computerized data bases.
- **Electronic mail** allows a telecommuter to keep up with office events and announcements and can be an easy way to exchange computer-based documents.

## Program Design

- **Form a steering committee**
- **Develop policy**



**Technology**  
(continued)



■ **Facsimile (or fax) machines** are ideal for telecommuters who need to review contracts or other documents and then forward them to someone else in the office.

■ **Pocket pagers** or cellular telephones work best for telecommuters who are frequently in the field or out of the main office and are needed on an emergency basis.

**Insurance**

Decide who pays for the insurance. Will the insurance cover employer-owned equipment and supplies? Will it cover employee-owned equipment and supplies used while working for the company?

**In-Office Workspace**

While telecommuting can be a way to conserve office space, your policy should reflect the fact that telecommuters are still an integral part of the organization. Taking away or substantially reducing their office space may make them feel like outsiders on the days when they're on-site. Take into consideration how many employees telecommute in a particular department and how often.

**Selection Criteria**

A prototype program only allows some of the employees to telecommute, so you must determine how you'll select the lucky few. The criteria for these participants may be based upon:

- Willingness/approval of their supervisors.
- Suitability for participation based on job and personality characteristics.
- Availability of equipment at home.
- Commuting distance.
- Availability of work space at home.
- Previous performance.

For more details on selection see pages 15–18.

**Time Lines**

Depending on the size of your program, getting it off the ground may take anywhere from a few months to a year. Some general guidelines for how much time each step will take:

Program Stage	Low	High
■ Policy development	Two weeks	Two weeks
■ Telecommuter's agreement	Two weeks	Two weeks
■ Employee and manager presentations	One month	One month
■ Selection	Two weeks	Two weeks
■ Training	Two weeks	Two weeks
■ Troubleshooting	Ongoing	Ongoing
■ Evaluation	Ongoing	Ongoing

## Non-Telecommuters

You must decide how you'll deal with people who are not telecommuting. How will you appease those who are not selected for the prototype program? Or those who don't qualify for permanent telecommuting? Also, some employees choose not to telecommute, and your policy should reassure everyone, whether they choose not to telecommute or are not selected, that they won't wind up taking telecommuting co-workers' calls or assignments. In fact, this goes a long way toward eliminating potential resentment.

## Program Design

- *Develop policy*
- *Estimate costs and savings*

## Answering Phones

Decide who will answer phones for telecommuters and how. (See *Telephone Etiquette*, page 72 for suggestions.)

## Communications Needs

There are three basic options for communicating with telecommuters when they are working away from the central office:

- Telecommuters call in for messages on a regular basis.
- Phone calls are forwarded to the telecommuter's home or remote work site through electronic call forwarding.
- The telecommuter's home or remote-work number is given to co-workers and others who need to contact the telecommuter on a frequent basis. (Since some telecommuters may not want their home phone numbers widely distributed, you should consider the telecommuter's preferences if choosing this option.)

## Scheduling



Decide on a centralized system (such as a master calendar) for documenting when employees are telecommuting and how they can be reached. (Please refer to *Sample Master Schedule* on page 73.)

There may be other policy issues that your steering committee will need to consider. It's the telecommuting coordinator's job to make sure that the group makes decisions, commits to them and does not lose momentum.

Once you have developed a policy, make it available to all employees. This will hold rumors at bay and let employees know that the telecommuting program is legitimate and fair.

## Estimate Costs and Savings

Prototype programs do not have to be very expensive. Your two main expenses will be equipment and time. Depending on your needs, here's what you can expect to spend:

**Estimate Costs and Savings**  
(continued)

■ **Start-Up Costs of a Home Office**

**Low-Tech**  
\$0-\$50

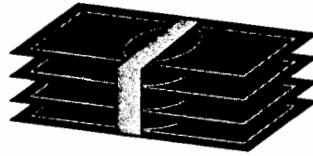
Office supplies  
Existing phone  
Answering machine

**Medlum-Tech**  
\$1,500-\$3,000

Office supplies  
Existing phone  
Answering machine  
Computer (low end)  
Modem  
Software  
Printer

**HI-Tech**  
\$3,000-\$8,500

Office supplies  
Second phone line  
Answering machine  
Computer (high end)  
Modem  
Software  
Printer  
Fax machine



**Who Pays for What?**

You don't have to foot the entire bill. Here are some options:

- Share portable computers and printers among telecommuters.
- Let people use their personal equipment at home.
- Subsidize the cost of buying equipment.
- Subsidize the cost of upgrading equipment the employee may already have at home.

**Management Costs**

You may need to hire someone to train staff, select equipment and monitor results of your program. Or you may have someone already on-staff handle these tasks or choose to bring in a consultant. In general, you can expect to spend:

Personnel	Small- to Medium-Size Business	Large Corporation
■ Coordinator	10 to 20 percent annual salary for six months	25 to 50 percent salary for one year
■ Trainer	One to two weeks	Two to three weeks

**Benefits**

The State of California found it recovered money spent on its telecommuting program in less than two years. Here's how:

Real Savings	Avoided Costs
■ Increased employee productivity or effectiveness—8.81 percent of employee's salary.	■ Office space—5 percent savings
	■ Turnover (staff replacement cost)—50 percent of average salary
	■ Decreased sick leave—.5 percent of average salary

## Hold Briefing Sessions

Invite anyone that may want to participate in the telecommuting program to briefing sessions. More than just pep rallies, these sessions give you the chance to answer all their questions and ask a few of your own. Many companies hold separate sessions for management and staff so they'll feel free to express any concerns. Use their suggestions to shape the program to further meet their needs. (For an idea of management's most common worries about telecommuting, see *Answers to Common Telecommuting Questions*, pp. 56–58.)

The telecommuting coordinator usually runs the briefing sessions with help from steering committee members. If possible, have the CEO of your firm “kick off” the session as a sign of commitment to the program.



(If telecommuting is only being tested on a particular group, ask the department or division head to speak instead.) If you have the budget, show a video (See *Resources*, p. 37–38). Whatever you decide, have fun with it!

Here's what most people in your company will want to know:

- What telecommuting is.
- What are its benefits and possible drawbacks.
- Why your organization is interested in testing the concept.
- What your specific policies are.
- Who can participate.
- How long the pilot phase will last.
- A review of the telecommuter's agreement.
- The next step, e.g., selection of telecommuters.

If your organization is surveying to select the participants, the surveys are usually given out at the end of the briefing session.

## Program Design

- Estimate costs and savings
- Hold briefing sessions
- Select telecommuters and telemanagers

## Select Telecommuters and Telemanagers

Not every employee, supervisor or job is appropriate for telecommuting.

The ideal telecommuter usually:

- Is self-motivated.
- Has a positive attitude towards telecommuting.

## **The Ideal Telecommuter** (continued)



- Is well-organized.
- Has a high level of productivity.
- Requires minimal supervision.
- Gets along well with household members.

■ Prefers the home environment for at least some of the week.

■ Is comfortable with the idea of working alone.

■ Has a high degree of job knowledge and skill.

■ Has strong time-management skills.

■ Has a positive attitude towards telecommuting.

■ Is willing to let his or her employees telecommute.

■ Has strong communication skills.

■ Manages by results and not by monitoring work hours.

■ Delegates work easily.

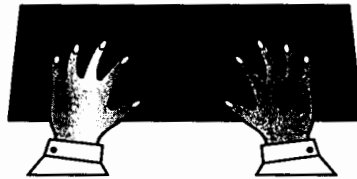
■ Is well-organized.

■ Is open to new ideas.

■ Trusts employees.

## **The Ideal Telemanager**

## **The Ideal Jobs for Telecommuting**



Most jobs that require writing, reading, research, thinking, editing, working with data (entry, processing, coding, etc.) and talking on the phone can be performed easily from home or another remote location.

Other jobs that may not seem appropriate at first may be modified so that the worker can telecommute. One of the secrets of designing a good telecommuting program lies in the ability to organize specific jobs so that they can be done without constant interaction or need for feedback.

## **Selecting Telecommuters and Telemangers**

There are two basic ways to select the appropriate participants:

- **The informal method.** Managers simply ask their employees if they'd like to try telecommuting. Since not every employee will qualify—and because even among those that do qualify, your prototype program may not be able to include them all—managers must be prepared to deal with disappointed employees.

If your program will include more than 10 to 20 participants, you may want to use a more formal method of selection.

## Selecting Telecommuters and Telemanagers (continued)

### The Telecommuter Screening Survey

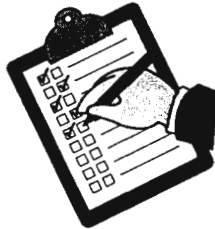
- **The formal method.** Telecommuters and telemanagers fill out screening surveys. These surveys become the basis for determining who can and cannot telecommute.

## Program Design

### ■ Select telecommuters and telemanagers

The first section of the telecommuter screening survey (see *Sample Selection Survey for Employees*, pp. 59–62) asks potential participants to respond to a series of questions on:

- The nature of their current jobs.
- The potential of their jobs for telecommuting.
- Their characteristics as employees and as telecommuters.
- Their supervisors' management style and attitude towards telecommuting.



The second section of the survey is designed to make respondents think about whether telecommuting is feasible for them. It poses questions on: availability of space to work at home, previous experience with telecommuting, how often they'd like to telecommute, etc.

Sometimes a company includes a third section if its steering committee selection criteria is based on other factors such as commuting distance, marital status, etc.

Usually, after employees fill out a screening survey, they themselves can determine whether they are appropriate candidates for telecommuting.

### The Telemanager Screening Survey

The telemanager screening survey is similar to the employee screening survey. (See *Sample Selection Survey for Supervisors*, pp. 63–66.) In the first section of the survey, telemanagers are asked about:

- The nature of the employee's job.
- The potential for the employee's job as a telecommuter.
- The employee's personality characteristics.
- Their own management style.

In the second section, telemanagers respond to specific questions that are designed to make them think more about the possibility of telecommuting in their group.

After a supervisor has filled out a survey on each potential telecommuter, he or she will know who are good candidates for telecommuting.



**Analysis of the  
Screening Surveys**

The screening committee can select a few of its members to be in charge of selecting the telecommuters. This subcommittee reviews all surveys and decides who can—and cannot—telecommute, always keeping survey information private. Generally, the subcommittee agrees that:

- Employees should be selected for the program only if both they and their managers agree that they are suitable.
- In general, managers determine their own suitability to telemanage.

<i>Manager Evaluation</i>	<i>Employee Evaluation</i>	<i>Accept Do Not Accept for Telecommuting</i>
■ Manager suited	Employee suited	Accept for telecommuting
■ Manager suited	Employee not suited	Do not accept
■ Manager not suited	Employee suited	Do not accept
■ Manager not suited	Employee not suited	Do not accept

- If the employee and manager disagree, the subcommittee may need to investigate further. For example, sometimes a manager may be open to the idea of telecommuting, but not for a particular employee—even if that employee's survey indicated that he or she would make a suitable telecommuter.
- If the employee and manager are vague or noncommittal in their surveys, the subcommittee may decide to interview them in private to clarify matters. Or it may decide to disqualify the employee from the prototype program and consider him or her again when the company offers telecommuting on a larger scale.

**Write a  
Telecommuter's  
Agreement**

To protect the rights of all involved, employees and their supervisors will need to sign a telecommuter's agreement. The coordinator usually drafts the agreement and gives it to the steering committee and legal counsel for a stamp of approval.

This document explains the guidelines of the telecommuting program and details what is expected of its participants. Some companies refer to it as a "guide" or "guidelines." There are two ways to prepare a telecommuter's agreement:

**Version One**

Prepare a document that details company policy on the following:

- Telecommuting is voluntary and requires cooperation from the supervisor and commitment from the telecommuter. Either party can terminate the telecommuting arrangement at any time.
- The telecommuter's performance is measured by objectives and results.



**Version One**  
(continued)

- The basic terms and conditions of employment do not change because a person telecommutes, nor does it alter his or her salary, job responsibilities, benefits and company-sponsored insurance.
- Who is responsible for maintaining equipment, including any computers, modems, printers, fax machines, telephone lines, telephones, office furniture and supplies?
- Is the telecommuting program full-time or part-time?
- What are the eligibility requirements?
- Work hours, vacation time and overtime compensation must be mutually agreed upon by both the telecommuter and his or her supervisor.
- Telecommuters who work at home will designate a specific work space for the purpose of worker's compensation liability issues. The supervisor, with a 24-hour advance notice, has the right to inspect the telecommuter's designated work space to ensure compliance.
- Security and integrity of data must be protected.



- Tax deductions and related implications due to telecommuting are the employee's responsibility. The employee should see a professional tax consultant for details.

- Telecommuting is not a substitute for child or other dependent care.
- Telecommuters will be required to participate in all surveys and evaluations for the telecommuting program.
- Policies, practices and instructions of the organization remain in effect during work hours while the telecommuter is working at the remote location.

If your prospective telecommuters belong to a union, you may need to consider its needs when drafting the telecommuting agreement.

For an example of a telecommuting agreement, see *Sample Telecommuting Agreement*, pp. 50–53.

**Version Two**

Instead of a formal agreement as shown above, compile an information packet on the telecommuting program, including a telecommuting policy. Telecommuters would sign a summary sheet which states that the telecommuter:

- Has received, read and understands the telecommuting guidelines and policies.

**Version Two**  
*(continued)*

**Personalizing the  
Telecommuting Agreement**

- Agrees to abide by the terms of the agreement.
- Understands all policies and procedures that are in effect while telecommuting.
- Understands the work hours, designated work space, safety and security measures, and the protection of the organization's assets, information, and proprietary information.
- Understands that telecommuting is a voluntary arrangement that can be altered or terminated by either the employee or by the company at any time.



Include an attachment that the telecommuter and manager can fill out detailing their individual agreement, including:

- The address of the remote work location and whether it is the employee's residence or a company location.
- A description of the designated work space.
- The telecommuting schedule, including the number of telecommuting days per week (or month) and telecommuting hours.
- A detailed inventory of company-provided equipment to be used for telecommuting.
- The data bases and/or mainframes that the telecommuter may access.
- A detailed inventory of employee-provided equipment (both hardware and software) that will be interfacing with company equipment.

Distribute telecommuting agreements to all employees during the briefing session. Signed telecommuter's agreements are usually collected prior to the time people actually start telecommuting—on the day of training, for example. Keep signed documents in the employee's personnel file.

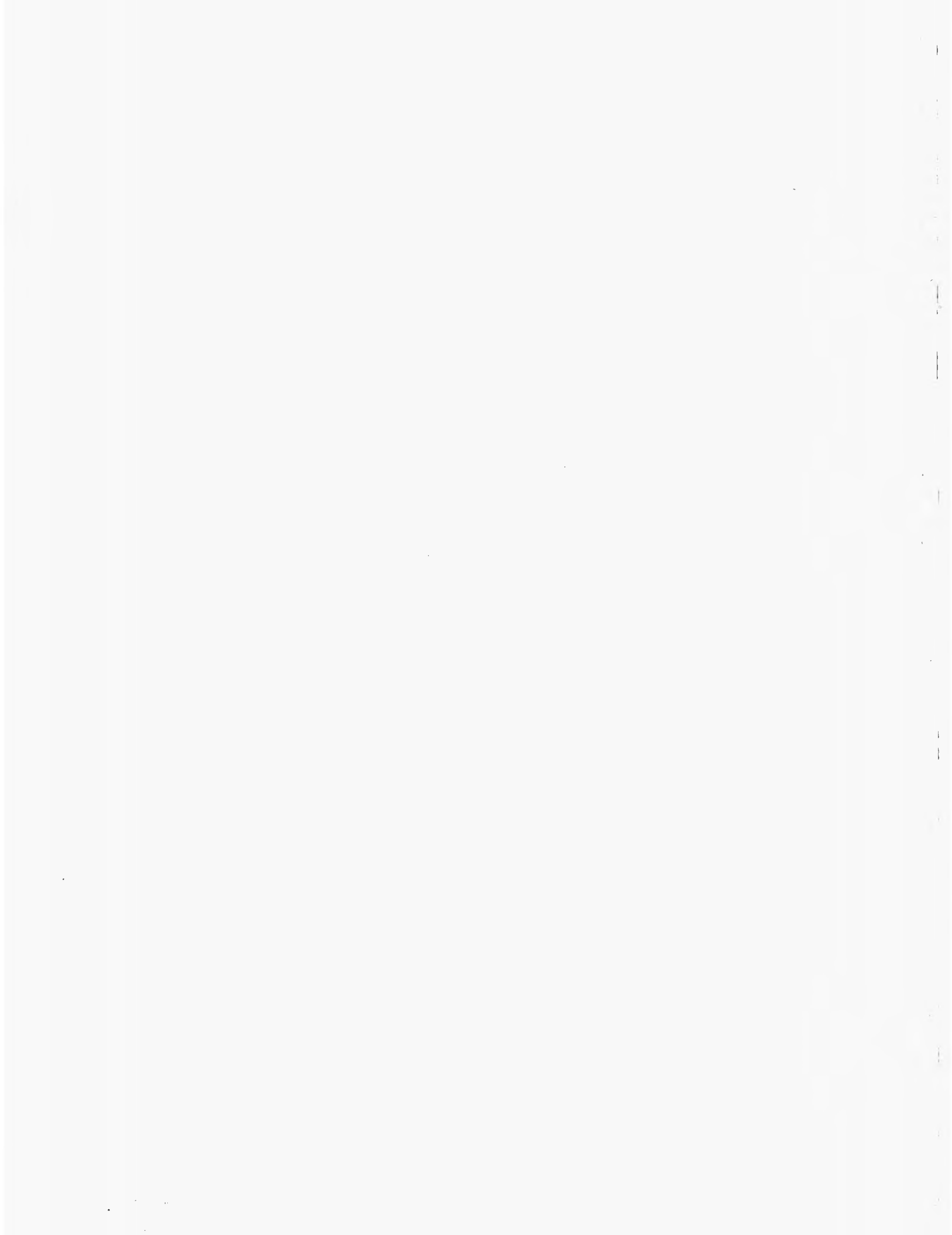
It should be noted that none of the existing telecommuting agreements have ever been tested in a court of law—but there have been very few cases of abuse in a telecommuting program.

# Implementation

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- *Overview*
- *Training*
- *Monitoring and evaluating*



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## Overview

### Training: Sample Two-Day Session

### Preparing for Sessions

No matter how well-designed your telecommuting program is, it won't work unless people know how to use it. Most companies start with some sort of training. It gets telecommuters off to a good start and often helps managers feel more confident and in control. In the first portion of this section, we outline a sample training session for telecommuters and telemanagers. You may follow it step-by-step or adapt it to suit the needs of your employees. The second part of the section deals with evaluating how well your planning and training paid off. Is telecommuting working for your company? Should you make any adjustments? Is it time to expand?

Conduct training in three sessions (about two to three hours each):

■ **Session A: Telecommuters**

Telecommuters learn how to schedule their work, set up a home office and get tips on how to work well at home.

■ **Session B: Telemanagers**

Managers are briefed on how to effectively supervise workers when they're not on-site.

■ **Session C: Telecommuter-Telemanager Teams**

Telecommuters and their managers together plan the first month of telecommuting—setting up schedules, assignments and discussing how to handle daily routines as well as office crises. They learn the fine art of communicating without daily face-to-face contact.

- Provide a meeting room with writing surfaces at tables.
- Have a flip chart or chalk board available.
- Create worksheets based on the samples in this handbook; photocopy handouts.

## Implementation

■ **Overview**

■ **Training Session A**

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## Session A: Telecommuters

### Activity 1: Scheduling Telecommuting Days

- **Worksheet Needed:** *Calendar* (Figure A.1)

- **Handout:** None

- **Goal:** The purpose of this activity is to determine how many days per week a telecommuter can feasibly telecommute. Suppose, for example, an employee hoped to work at home two days a week. Are there enough of the types of tasks that can be done at a remote location to keep him or her busy?

**Session A: Activity 1**  
(continued)

■ **What to do:**

1. Hand out copies of the *Calendar* worksheet.
2. Ask employees to think back to the week prior and list on the calendar each specific task that they performed during the week.
3. Evaluate the number of days per week they could telecommute at home by instructing them to:
  - Circle tasks that could be done at a site other than the main office.
  - Circle face-to-face meetings that could have been handled by phone from their office at home.
  - Group together the tasks they can do at home onto days they did not have to be on-site.
  - Cluster the on-site tasks onto the remaining days.
  - Ask them: How many days last week could you have telecommuted by rearranging your schedule? Was last week typical?
4. Ask employees the number of days per week they think they could telecommute on a routine basis.
5. Employees should also check off any equipment that they used while working. This portion of the worksheet will be used in Session Three.

**Figure A.1**

**Sample Worksheet: Calendar**

<i>On-Site</i>	<i>Home Office</i>	<i>On-Site</i>	<i>Home Office</i>	<i>On-Site</i>
<b>Monday</b>	<b>Tuesday</b>	<b>Wednesday</b>	<b>Thursday</b>	<b>Friday</b>
<b>Morning</b>	<b>Morning</b>	<b>Morning</b>	<b>Morning</b>	<b>Morning</b>
staff meeting	budget discussion with Mark	budget meeting revise budget	prepare presentation	finish invoices
<b>Afternoon</b>	<b>Afternoon</b>	<b>Afternoon</b>	<b>Afternoon</b>	<b>Afternoon</b>
work on budget	phone suppliers write letters		write letters check invoices	budget presentation to Exec. Comm.
Commuter	Commuter	Commuter	Commuter	Commuter
Cooper	Cooper	Cooper	Cooper	Cooper
FAX	FAX	FAX	FAX	FAX
Paper Files	Paper Files	Paper Files	Paper Files	Paper Files
File Mail	File Mail	File Mail	File Mail	File Mail
Other	Other	Other	Other	Other

## Activity 2: Planning a Home Office

## Implementation

### ■ Training Session A

■ **Worksheet Needed:** None

■ **Handouts:** *Setting Up a Home Office* (pp. 69–70); *Safety Issues* (page 71).

■ **Goal:** The purpose of this activity is to help employees design their home office so it is efficient, safe and easy to work in.

■ **What to Do:**

1. Hand out *Setting Up a Home Office* and discuss it as a group. In addition, be sure to let them know:

- They must be realistic about setting up an area where they can spread out tasks and work without interruption.
- Worker's compensation liability may be limited to their designated work areas.
- OSHA regulations may apply to their home offices.
- Planning will help reassure their supervisors that they can work productively at home.

2. Have employees plan their home offices "on paper." Each participant should:

- Sketch the floor plan of his or her home.
- Draw an enlarged plan of the proposed home office space.
- Indicate windows, doors, telephone and electrical outlets.
- Indicate where the desk, computer, printer, storage and other job-related equipment would go.

Discuss with the group whether their chosen locations are realistic. Help them find better solutions than the "ironing board office"—i.e., a cramped workspace in the utility room.

3. To determine if they are properly equipped, review the *Safety Issues* handout and/or ask questions such as:

- Are the electrical outlets grounded (i.e., take a 3-prong plug)?
- Is there a secure place to store company materials?
- What additional equipment and/or furniture will you need?
- Is the light control adequate for using a computer monitor?



**Session A: Activity 2**  
(continued)

**Activity 3: Resolving Concerns About Telecommuting**

- Will the room temperature be comfortable during working hours?
- Do you have a comfortable chair?
- Are work surfaces and computer keyboard at comfortable heights?
- **Worksheet Needed:** *Resolving Concerns About Telecommuting* (Figure A.2)
- **Handout:** None
- **Goal:** The purpose of this activity is to let employees air any concerns they may have about working at home.
- **What to Do:**

Have telecommuters list their concerns on the worksheet. Select the common concerns of the group and "brainstorm" possible solutions.

**Figure A.2**

<i>Sample Worksheet: Resolving Concerns About Telecommuting</i>	
<i>What changes do you anticipate? How will you deal with them?</i>	
<i>Concerns as a Telecommuter</i>	<i>Solutions</i>
<ul style="list-style-type: none"> <li>■ <b>Relations with Supervisor</b> <i>Fewer chance encounters.</i></li> </ul>	Schedule frequent, brief meetings.
<ul style="list-style-type: none"> <li>■ <b>Relations with Coworkers</b> <i>Coworkers may feel imposed upon.</i>  <i>Coworkers may hesitate to call me at home.</i></li> </ul>	Minimize your requests for help by planning ahead. Help them in return.  Call them from your home office. Use call forwarding or provide a home office number.
<ul style="list-style-type: none"> <li>■ <b>Relations with Household Members</b> <i>Family members may interrupt work.</i></li> </ul>	Try scheduling coffee and lunch breaks. Firmly adhere to work times.
<i>What do you think are your supervisor's concerns?</i>	
<ul style="list-style-type: none"> <li>■ Manager won't think I'm really working.</li> <li>■ I won't be available in a crisis.</li> </ul>	

## Session B: Telemanagers

### Activity 1: Scheduling Telecommuting

■ **Worksheet Needed:** *Calendar* (Figure B.1)

■ **Handout:** None

■ **Goal:** The purpose of this activity is to get the supervisor's view of a feasible telecommuting schedule.

■ **What to Do:**

1. Hand out copies of the *Calendar* worksheet.
2. Instruct managers to fill out a separate calendar (or use different colored markers) for each of their telecommuters.
3. Evaluate the number of days their employees could work at home by instructing them to:
  - Write in each face-to-face meeting.
  - Circle any face-to-face meetings that could have handled by phone or memo.
  - Group together the tasks that employees could do at home on the days that the employee did not have to be on-site.
  - Write in any tasks that the telecommuter could only have performed in the central office.
  - Ask them: How many days last week could the employee have telecommuted by rescheduling? Was last week typical?
4. It may be appropriate with some groups to discuss the pros and cons of telephone or conference calls versus face-to-face meetings.

### Implementation

■ *Training Session A*

■ *Training Session B*

Figure B.1

Sample Worksheet: Calendar				
Work Location: <i>Home Office</i>				
Monday	Tuesday	Wednesday	Thursday	Friday
<i>Morning</i> <i>Staff Meeting</i>	<i>Morning</i>	<i>Morning</i> <i>Budget Meeting</i>	<i>Morning</i>	<i>Morning</i> <i>Check Presentation</i>
<i>Afternoon</i>	<i>Afternoon</i> <i>Check Budget Progress</i>	<i>Afternoon</i>	<i>Afternoon</i>	<i>Afternoon</i> <i>Executive Comm. Meeting</i>
Computer Copier Fax Paper Files Ref. Mat'l. Other	Computer Copier Fax Paper Files Ref. Mat'l. Other	Computer Copier Fax Paper Files Ref. Mat'l. Other	Computer Copier Fax Paper Files Ref. Mat'l. Other	Computer Copier Fax Paper Files Ref. Mat'l. Other

**Activity 2: Resolving Concerns About Telecommuting**

- **Worksheet Needed:** *Resolving Concerns About Telecommuting* (Figure B.2)
- **Handout:** None
- **Goal:** The purpose of this activity is to let managers air their specific concerns or ask questions on how to manage telecommuters.
- **What to Do:**  
Have managers list their concerns on worksheets. Select the common concerns of the group and "brainstorm" possible solutions. (You may want to group the concerns under topics such as "equipment," "accountability," and "handling crises." This way, you can stress that while some situations may call for technical answers, others call for changes in procedures.)

**Figure B.2**

<i>Sample Worksheet: Resolving Concerns About Telecommuting</i>	
<i>What changes do you anticipate? How will you deal with them? List your concerns about managing telecommuting. Include questions you may have about scheduling procedures, home office equipment, or other concerns.</i>	
<i>Typical Manager's Concerns</i>	<i>Solutions</i>
■ <i>Needing the telecommuter in a crisis</i>	<b>Agree on policy with telecommuter</b>
■ <i>Security of materials</i>	<b>Require a locked file</b>
■ <i>Scheduling telecommuter</i>	<b>Discuss with telecommuter</b>
■ <i>How do you know they're working?</i>	<b>Use performance measures</b>
■ <i>Equipment</i>	<b>Discuss with telecommuter</b>
■ <i>Job-specific furniture for the home office, e.g., a drafting board</i>	<b>Discuss with telecommuter</b>
■ <i>Household interference</i>	<b>Discuss with telecommuter</b>
■ <i>Telephone contact</i> <i>Spouse or children answering phone</i> <i>No one answering phone</i>	<b>Ask telecommuter to set policy in home answering machine, and/or beeper</b>
■ <i>Overload on coworkers</i>	<b>Resolve at staff meetings</b>
■ <i>Reference materials</i>	<b>Provide duplicate copies, courier service, fax, or scan into online storage</b>

**Activity 3: Task-Oriented Management**

- **Worksheet Needed:** *Measuring Effective Work* (Figure B.3)
- **Handout:** None
- **Goal:** The purpose of this activity is to introduce managers to the concept of "management by results," or judging employee performance based on the quality and quantity of work produced, not by the actual number of hours worked.

**Session B: Activity 3**  
(continued)

1. Using their *Measuring Effective Work* worksheets, have managers write down:

**Implementation:**

- What specific tasks their employees perform.
- How the manager knows if a task is done well now.
- What measures they feel they could use to determine what tasks are done on telecommuting days.

- *Training Session B*
- *Training Session C*

2. Lead a discussion on how to manage telecommuters, asking managers:

- What performance measures do you use for on-site workers?
- Do you anticipate performance of telecommuters will be lower, higher or the same as performance at the central office? Why?
- What management techniques can you use to promote greater effectiveness?

**Figure B.3**

*Sample Worksheet: Measuring Effective Work*

1. List specific tasks that the prospective telecommuters perform.
2. How do you know if a task is done well now? List the measures you currently use to judge whether your staff are working effectively.
3. What measures could you use for tasks performed on telecommuting days?

Task	Performance Measure: On Site	Home Office Work
■ Write Energy Report	Completion of report by due date	Completion of report by due date
■ Word Processing	Lines of text typed per day	Lines of text typed per day

**Session C: Training for Telecommuter-Telemanager Teams**

**Activity 1: Getting Off to a Good Start**

- **Worksheet Needed:** *Calendar* (see Figure C.1)
- **Handout:** None
- **Preparation:** Arrange tables in the meeting room so that telecommuter-telemanager teams can work together in separate groups.

**Session C: Activity 1**  
(continued)

- **Goal:** The purpose of this activity is to prepare a schedule and set some ground rules for the first month of telecommuting that both the telecommuter and telemanager agree on.

- **What to Do:**

1. Ask telecommuters and telemanagers to compare the *Calendar* worksheets brought from previous sessions.

2. Set up a schedule by instructing them to:

- Work out any differences in their perceptions of how last week's assignments could have been performed while telecommuting. Do they both consider last week typical?

- Pencil in a tentative schedule for the coming month. What projects are underway or anticipated?

- Circle any tasks that can be done at home.

- Circle any meetings that can be handled by phone.

- Group together items they have circled by drawing arrows to the days they have set aside for telecommuting. Are these the days most feasible for telecommuting?

3. Ask each team to develop written guidelines for handling crises that require telecommuters' help on home office days, including:

- How they will deal with the need for the telecommuter to attend unscheduled face-to-face meetings.

- Guidelines for asking the telecommuter to come in to the office on at-home days. (For example, telecommuters living an hour from the central office will need at least an hour and a half notice.)

- **Worksheet Needed:** *Calendar* (see Figure C.1)

- **Handouts:** *Setting Up a Home Office*, pp. 69–70; *Safety Issues*, page 71.

- **Goal:** The purpose of this activity is to determine what the telecommuter will need from the company to help set up a home office.

- **What to Do:**

1. Using their *Calendar* worksheets, ask each team to analyze the tasks scheduled to be done at home. They will need to decide:

- What equipment, reference materials and supplies the telecommuter will need. (Use the checklist at the bottom of the *Calendar* worksheet from Session A.)

**Activity 2: Equipping  
the Home Office**

**Session C: Activity 2**  
(continued)

**Implementation**

■ **Training Session C**

- Who will provide the equipment.
- What support is required on-site, such as access to the office automation system.
- How job-related expenses such as long distance telephone charges will be reimbursed.

**Figure C.1**

**Sample Worksheet: Calendar for the Month of \_\_\_\_\_**

Monday	Tuesday	Wednesday	Thursday	Friday
Date: Location:	Date: Location:	Date: Location:	Date: Location:	Date: Location:
Monday	Tuesday	Wednesday	Thursday	Friday
Date: Location:	Date: Location:	Date: Location:	Date: Location:	Date: Location:
Monday	Tuesday	Wednesday	Thursday	Friday
Date: Location:	Date: Location:	Date: Location:	Date: Location:	Date: Location:
Monday	Tuesday	Wednesday	Thursday	Friday
Date: Location:	Date: Location:	Date: Location:	Date: Location:	Date: Location:
Monday	Tuesday	Wednesday	Thursday	Friday
Date: Location:	Date: Location:	Date: Location:	Date: Location:	Date: Location:

**Activity 3: Agreeing on Deliverables**

- **Worksheet Needed: Deliverables** (See Figure C.3)
- **Handouts:** None
- **Goal:** The purpose of this activity is to help each telecommuter/telemangement team set short term goals.
- **What to Do:**
  1. With the groups, review the two types of deliverables: "products" and "number of items processed."

**Session C: Activity 3**  
(continued)

- Help them break down "product" deliverables into steps (as is shown in Figure C.2).
- Review "number of items processed," such as setting goals for sales calls, data entries or lines of program code.

2. Fill out the *Deliverables* worksheet for the first month of telecommuting. Even a telecommuter/telemanager team that usually only works day-by-day can use this exercise to agree on performance expectations.

**Figure C.2**

	Interim Product 1	Interim Product 2	Final Product
■ Task A	Outline	Draft	Report
■ Task B	Sketch	Drawing	Final Rendering

**Figure C.3**

Sample Worksheet: Deliverables

Task	Deliverable	Deliver To:	Due Date	Completed
Energy Report	Outline	Kevie	6/3	6/3
Energy Report	Draft	Kevie, Grace	6/15	6/15
Energy Report	Revised Draft	Grace	6/20	6/20
Energy Report	Final Report	Commissioner	7/1	7/1

**Activity 4: Communication and Evaluation**

- **Worksheet Needed:** *The MBO Challenge* (See Figure C.4)

- **Handout:** None

- **Goal:** The purpose of this activity is to help telecommuters and their managers learn to communicate without daily face-to-face contact.

- **What to Do:**

1. Discuss with the group that each member of the telecommuter/telemanager team has a responsibility.
  - The manager should give specific and detailed instructions, in contrast to working together on a basis of "I'll know it when I see it."
  - The telecommuter should ask questions to gain enough feedback to do the expected job. Try "What you're telling me is...?" or "You want me to...?"



**Session C: Activity 4**  
(continued)

2. Using the *MBO Challenge* worksheets, lead teams through the exercise developed by Pacific Bell Vice-President John Seymour.

**Implementation**

■ *Training Session C*

**Figure C.4**

**Sample Worksheet: The MBO Challenge**

Together choose an example of a recent instruction to perform a future task that was given by the supervisor to the subordinate.

Each jot down what you think is expected.

Compare the sets of instructions. What could be added to make the two sets of expectations match?

Play this game until you reach a match.

Repeat the exercise using a new assignment for next month.

**Examples of instructions that may need clarification:**

- "Get out the payroll."
- "Get together some slides for my talk next week."
- "Call on more mid-sized businesses."

**Activity 5: Addressing Concerns**

- **Worksheet Needed:** *Resolving Concerns About Telecommuting* (Prepared in Sessions A and B).
- **Handout:** None
- **Goal:** The purpose of this activity is to help telecommuters and telemanagers understand each others' concerns.
- **What to Do:**
  1. Ask telecommuters and their managers to compare their lists of concerns. They should:
    - Try to resolve or dispel each item, considering both technological and human relations solutions.
    - Try "lateral thinking," that is, new ways to handle issues in this new situation.
    - Decide what procedures will best serve the clients, customers, employer and employee.

**Session C: Activity 6**  
**Starting Discussions**

- **Worksheet Needed:** *Topic Checklist* (Figure C.4)
- **Handout:** Company Telecommuting Policy
- **Goal:** The purpose of this activity is to allow telecommuters and telemanagers to discuss additional telecommuting issues.
- **What to Do:**
  1. Hand out copies of your company's written telecommuting policy. Ask each team to review the policy, covering each topic and confirming that it applies. They should note any exceptions in writing.
  2. Using the *Topic Checklist*, each team should discuss any telecommuting issues not already covered.

**Figure C.4**

*Sample Worksheet: Topic Checklist*

<input checked="" type="checkbox"/> Time-keeping and reporting requirements.	<input checked="" type="checkbox"/> A listing of all assigned tasks with interim and final due dates.
<input checked="" type="checkbox"/> Terms under which employee will be compensated for overtime, if authorized.	<input checked="" type="checkbox"/> Duration of particular employee's term on the project, if applicable.
<input checked="" type="checkbox"/> Hours during which remote communications will be permitted with on-site computer facilities.	<input checked="" type="checkbox"/> Permissible remote work locations.
<input checked="" type="checkbox"/> Equipment ownership and use.	<input checked="" type="checkbox"/> Central office workstation. Will telecommuter keep existing office?
<input checked="" type="checkbox"/> Arrangements for repair and maintenance of employee-owned equipment.	<input checked="" type="checkbox"/> How emergencies will be handled.
<input checked="" type="checkbox"/> Scheduling of regular formal communications sessions and feedback sessions.	<input checked="" type="checkbox"/> Contingency arrangements should employee be unable to work in the home office for any reason.
<input checked="" type="checkbox"/> Frequency of routine contacts with departmental offices and supervisor in person or by telephone.	<input checked="" type="checkbox"/> Vacation schedule or method of scheduling.
<input checked="" type="checkbox"/> Handling internal and outside telephone calls.	<input checked="" type="checkbox"/> Career advancement issues. Promotion reviews.
<input checked="" type="checkbox"/> Arrangement for direct expense reimbursement such as telephone charges.	<input checked="" type="checkbox"/> Any other terms or conditions unique to the department or the participating employee.

## **Monitoring and Evaluating**

### **Informal Evaluation**

### **Formal Evaluation**

#### **Interviews**

#### **Focus Groups**

Whether you decide to just “ask around” to see how your telecommuting program is working—or launch a full-scale survey—what you learn in the process will help you fine-tune your program.

If your company is offering telecommuting as part of a mandated trip-reduction plan, you are required to provide a formal evaluation that supports your trip reduction count.

#### ■ **Start-up Through Third Month**

Keep in touch with telecommuters and their managers on a regular basis. Ask how things are going and be available to answer any questions that they may have.

#### ■ **At Month Three**

Hold a focus group. Let participants exchange ideas and “brainstorm” on solutions to problems.

#### ■ **At One Year**

You may want to survey telecommuters and their managers in writing.

Write a brief evaluation report for management with your suggestions for expanding the program and/or needed policy changes.

Remember the goals you first listed in your policy statement? This is the time to dust them off and see how close you’ve come to achieving them. There are two times you would do an extensive, formal evaluation:

- At the conclusion of a pilot telecommuting program.
- To determine if your prototype telecommuting program should be expanded, revised or reconsidered.

Most formal evaluations will use one or more of the following research methods:

One-on-one interviews allow people to express reservations about telecommuting that they may hesitate to mention in a group setting.

Hold focus groups regularly—every one to three months is ideal. Meet with the telecommuters and supervisors separately. The facilitator (usually the telecommuting coordinator) should allow participants to vent their feelings but not put words in their mouths. Encourage the group to find constructive solutions to problems. The following issues are usually discussed at focus groups for telecommuters:

- How long have you been telecommuting?
- If you have not yet begun, why not?

## **Implementation**

- **Training Session C**
- **Monitoring and evaluating**

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**Focus Groups**  
(continued)

- How often do you telecommute?
- What interruptions cause you to miss scheduled days?
- Have there been any surprises?
- What ways have you found to separate home and office life?
- What changes or additions to your home office would improve your ability to work effectively?
- Are there tips anyone would like to share?
- Are there any problems you would like the group to help solve?
- What procedural changes would facilitate telecommuting?
- What disadvantages of telecommuting have you found? What changes would help?
- Do you want to continue to telecommute?

Similar topics are covered in focus groups of telemanagers.

**Surveys**

Use surveys to collect the statistical information needed to assess your telecommuting program. Responses to written, standardized questions give a more objective view of telecommuting than interviews and focus groups.

**Research Data  
Collection**

Researchers may request permission to study your company's telecommuting program. The data they collect can help you refine your program.

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**When Should You  
Offer Telecommuting  
Company-Wide?**

As the telecommuting coordinator, you'll probably be the one to push for expansion. After all, you have the best idea of how well the program is working. You're also the one hearing from people who are not included in the prototype who are eager to start telecommuting. Some ways to make the move toward a company-wide telecommuting program:

- During your evaluation process you'll find ways to improve your telecommuting program. Incorporate those changes into the prototype.
- Write a brief report to your CEO detailing the success of your program and any changes you've made to improve it. Request a statement of support that you can circulate among staff.

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***When Should You  
Offer Telecommuting  
Company-Wide?***  
*(continued)*

- Get staff on the telecommuting bandwagon. Testimonials from managers who are participating in the prototype are a great way to drum up support.

You may also opt to expand more slowly. One company let its existing employees decide for themselves if they wanted to telecommute. How fast and how much you expand your program is up to you and the needs of your company.

## ***Implementation***

- ***Monitoring and evaluating***
- ***When should you offer telecommuting company-wide?***





## Resources: Telecommuting Videos

Video	Title	Date	Length	Contact	Comments	Fee
■	<b>Hawaii Telework Center</b>	1989	10 min., 30 sec.	Statewide Transportation Planning Office State Department of Transportation 600 Kapiolani Blvd., Room 306 Honolulu, HI 96813		\$25
■	<b>Taking Work Home</b>	2/19/87	10 min., 30 sec.	U.S. West Communications Learning Systems 3898 S. Teller Lakewood, CO 80235 Attn: Mike Dillon (303) 763-1256 or Roland Fondacaro (303) 763-1423		\$25
■	<b>Riding the Network</b> (Telecommuting at Pacific Bell)	1986	8 min., 55 sec.	Advantage Media Inc. 21356 Nordhoff St. Chatsworth, CA 91311 Attn: Cindy Callan (800) 545-0166 or (818) 700-0504		\$15 preview (three-day evaluation) \$15 rental (five-day period) \$295 purchase
■	<b>President Bush on Telecommuting</b>	3/1/90 and 3/8/90	1 min.	Los Angeles County Chief Administration Office Policy and Support Division 222 N. Grand, Room 585 Los Angeles, CA 90012 Attn: Margery Gould (213) 974-2632 or Nancy Apeles (213) 974-2637	President George Bush's speech before the L.A. Chamber of Commerce on telecommuting and before the Cabinet regarding telecommuting as part of the transportation policy. Available from L.A. County for show only.	None
■	<b>"Beyond 9 to 5" Segment of 20/20</b>	3/3/89	15 min., 40 sec.	ABC Distribution Company 825 7th Ave. New York, NY 10019 Attn: Pamela Schaub (212) 887-1725  Specify VHS or Beta		\$260 for businesses \$160 for non-profit organization
■	<b>Videoconferencing: Moving Ideas, Not People</b>	1989	9 min., 10 sec.	GTE Service Corporation—GTE VisNet Information Resource Center—AV Library 1 Stanford Forum Stanford, CT 06904 Attn: Leonie Chandersingh (800) 542-8011 or (203) 965-2289		\$160 (two-week loan) \$250 (purchase)

Continued



## Resources: Telecommuting Videos

(continued)

Video Title	Date	Length	Contact	Comments	Fee
<p>■ <b>SWIFNET: The Instant Network</b> (Automated call routing to home-based telephone agents)</p> <p>1989</p> <p>15 min.</p>			<p>SWIFNET Development Team            Ambassador College            300 W. Green St.            Pasadena, CA 91129            Attn: Oleh J. Zajac (818) 304-4090</p>		

## Resources: Tapes or Transcripts of National and Local TV/Radio Broadcasts

Service Provider	Contact	Comments	Fee
<p>■ <b>Audio Video Reporting</b></p>	<p>5508 Cahueriga Blvd            N. Hollywood, CA 91601            Attn: Kainy Hawkins or Les Whiteside            (818) 763-5133</p>	<p>They keep tapes for only 30 days after the event. Give them advance notice of broadcasts, recordings, etc., that you want taped.</p>	<p>\$80 (plus postage)            \$25 (plus postage)</p>
<p>■ <b>Radio TV Reports</b></p>	<p>7039 Sursat Blvd.            Los Angeles, CA 90028            Attn: Stan Landsman (213) 466-6124</p>	<p>They may archive tapes for up to 60 days after a national broadcast event. Provide them with time, channel and subject.</p>	<p>\$80 (plus postage)            \$25 (plus postage)</p>

## **Resources: Annotated Bibliography**

### **Designing a Telecommuting Program**

The following resources will keep managers abreast of trends and provide contacts with program coordinators in other companies.

This is not a complete listing of all the materials available on the subject of telecommuting; instead, it provides a list of sources that you may find useful as you develop a telecommuting program of your own.

- *Home/Work*, by William Atkinson, *Personnel Journal*, November 1985, pp. 105–109.

This how-to article provides information on selecting and managing telecommuters.

- *A Company Without Offices*, by Eliza G.C. Collins, *Harvard Business Review*, January 1986, pp. 127–136.

This is an interview with Steve Shirley, president of F International, a computer consulting company with more than 1,000 employees in three countries, all of whom work from their homes.

- *Telecommuting: Planning for a New Work Environment*, by Gil E. Gordon, *Information Systems Management*, Summer 1986, pp. 37–44.

Gordon, a telecommuting consultant, discusses the impacts of telecommuting and how to form a successful telecommuting program.

- *Telecommuting*, by Carol-Ann Hamilton, *Personnel Journal*, April 1987, pp. 91–101.

Hamilton, a training specialist with the Hudson's Bay Company in Toronto, drew from the experiences of telecommuters in her company and other sources to compile this guide on planning a telecommuting program.

- *Telecommuting: Will it Work for You?* by Patrick Honan, *Computer Decisions*, June 15, 1984, pp. 88–98.

This article discusses the experiences of three firms—Metropolitan Life, Control Data Corporation and Continental Illinois Bank.

- *Exploring the Potentials of Decentralized Work Settings*, by Dan Lacey, *Personnel Administrator*, February 1984, pp. 48–52.

This interview with Marcia M. Kelly, then executive director of the research and consulting firm Electronic Services Unlimited, discusses the findings of a telecommuting study conducted by ESU.

- *Setting Up Work at Home*, by Lynne F. McGee, *Personnel Administrator*, December 1988, pp. 58–62.

This article provides information on the benefits of telecommuting and how to start up a telecommuting program.

**Designing a  
Telecommuting Program**  
(continued)

- *Telecommuting: How to Make it Work for You and Your Company.* Gil Gordon and Marcia Kelly, Prentice-Hall, Inc., 1986, 228 pp. (Available for \$15.95 pre-paid from: Gil Gordon Associates, 10 Donner Court, Monmouth Junction, NJ 08852 (908) 329-2266.)
- *The Telecommuting Review: The Gordon Report.* Telespan Publishing Corporation, 50 W. Palm St., Altadena, CA 91001. Monthly Periodical. \$157/year.
- *Telecommuting Advisory Council.* Co-chairs: Margery Gould (213) 974-2632 and Elham Shirazi (213) 650-7338; Secretary Carol Nolan (213) 975-7495.

A group of persons interested in telecommuting who meet bi-monthly in Los Angeles with teleconferencing participants from across the country. A prime source for up-to-date information on programs and materials.

**Evaluations of  
Telecommuting Programs**

- *Evaluation Report: Telecommuting Pilot Project for the Southern California Association of Governments,* by Pat Mokhtarian, Tom Brady, Kathy Yates, Waldo Lopez and Nedra Bickel, Southern California Association of Governments, 818 W. Seventh St., 12th Floor, Los Angeles, CA 90017.

This report on SCAG's telecommuting program gives plenty of details on their program and an in-depth evaluation.

- *AT&T Telecommuting Trial: Mid Term Survey.* AT&T, Los Angeles, October 1989.
- *California Telecommuting Pilot Project Final Report.* Department of General Services, State of California, JALA Associates, Inc., June 1990
- *Telecommuting Pilot Study: Final Report.* County of San Diego, Department of Public Works, June 19, 1990
- *Telecommuting Case History.* Pacific Bell, May 1985–July 1989. Carol Nolan.
- *Traffic Reduction by Telecommuting: A Status Review and Selected Bibliography,* by Jack M. Nilles. *Transportation Research*, vol. 22A, no. 4, pp. 301–317.

Nilles is one of the leading researchers in the field of telecommuting and was the one who originally coined the term.

- *Work-at-Home and the Quality of Working Life,* by Boas Shamir and Ilan Salomon, *Academy of Management Review*, vol. 10, no. 3, pp. 455–463.

These professors at Israel's Hebrew University raise concerns about the potential negative consequences of telecommuting. However, the problems that they identify can all be avoided if you properly design your telecommuting program. Their findings should be considered warnings, not predictions.

**The Effects of  
Telecommuting**



# Appendix

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- *Resources*
- *Case studies*
- *Sample telecommuting policy*
- *Sample telecommuting agreement*
- *Sample telecommuter's assignment*
- *Answers to common telecommuting questions*
- *Selection survey for employees*
- *Selection survey for supervisors*
- *A note on computer viruses*
- *Setting up a home office*
- *Safety issues*
- *Telephone etiquette*
- *Scheduling*





**The Effects of  
Telecommuting  
(continued)**

- *Telecommuting Arrives in the Public Sector*, by William H. Wagel, *Personnel*, October 1988, pp. 14–17.

David M. Fleming, program manager for the State of California's pilot telecommuting program, discusses the benefits of telecommuting and his experiences in getting approval for the program.

- *Incorporating Portable Offices into a Contingency Plan*. Joanne H. Pratt, *Contingency Journal*, September/October 1991.  
Discusses the role of telecommuting in maintaining business continuity following disasters such as fires and earthquakes.
- *Telecommuting as a Transportation Planning Measure: Initial Results of California Pilot Project*, by Ryuichi Kitamura, Jack M. Nilles, Patrick Conroy and David M. Fleming. *Transportation Research Record* 1285, 1990, pp. 98–104.

Analyzes multi-day travel data for 185 telecommuters, control group members and their driving-age household members. Finds a significant reduction in work travel for telecommuters and evidence that both telecommuters and their household members actually reduce non-work travel as well.

- *Teleworking in the Netherlands: An Evaluation of changes in Travel Behavior*, by Rebecca Hamer, Eric Kroes and Harry van Ooststroom, forthcoming in *Transportation*, Vol. 18, No. 4, 1991.

Also analyzed multi-day travel data, for 30 telecommuters and their household members (no control group). Involved longer reporting time periods (7 days) and more frequent reporting intervals (every three months for a year) than the Kitamura, *et al.* study. Results, however, are remarkably similar: not only a reduction in work travel by the telecommuters, but in non-work travel by the telecommuters and their household members alike.

- *Telecommuting and Travel: State of the Practice, State of the Art*, by Patricia L. Mokhtarian, Research Report UCD-ITS-RR-91-05, Institute of Transportation Studies, University of California, Davis, CA 95616.

Provides an overview of the status of telecommuting regarding the following areas: definitional issues, role in transportation policy, implementation, potential transportation impacts, current empirical findings on the transportation impacts, and areas for further research.

**Resources for Individuals  
Who Want to Telecommute**

Two guides to help you consider telecommuting and gain permission from your employer:

- *The Telecommuter's Handbook: How to Work for a Salary Without Ever Leaving the House*. Brad Schepp, Pharos Books, 1990, 208 pp. \$9.95.
- *The One-Minute Commuter: How to Keep Your Job and Stay at Home Telecommuting*. Lis Fleming, Acacia Books, 1989, 103 pp. \$9.95.

## Resources: Telecommuting Programs and Contacts

Organization/Program Status	Duration	Approximate No. Participants*	Contact Name/Comments
■ AT&T Southern California <i>Ongoing</i>	1989-	160	Kathie Fink 611 W. 6th St., Room 1030 Los Angeles, CA 90017 (213) 239-7166 <i>Non-Union Only</i>
■ Caltrans San Diego <i>Began 7/1/90</i>	1990-91	25	Pat Arrick 2829 Juan St. San Diego, CA 92101 (619) 237-6040
■ City of Glendale <i>Planning</i>	1990-present	Undecided	Rebecca Granite-Johnson 633 E. Broadway, Room 202 Glendale, CA 91206 (818) 956-3961
■ City of Los Angeles <i>Implementation</i>	1990-92	500	Wally Siembab 120 S. San Pedro St., Suite 600 Los Angeles, CA 90012 (213) 485-7963
■ Federal Government <i>Planning/Implementation</i>	1990-91 (one year)	400 in 15 agencies	Tom Cowley Classification & Pay Policy Division US GSA 18th & F Streets, NW Washington, DC 20405 (202) 501-1580/FTS 241-1580 <i>Any Agency Eligible</i>
■ HomeFed Bank <i>Implementation</i>	8/90-1/91	12	Amy Perkins 707 Broadway, Suite 800 San Diego, CA 92101 (619) 699-7433 <i>Exempt Employees Only</i>
■ Orange County Transit District <i>Implementation</i>	1990-present	30	Marilyn Marquez 12966 Euclid Garden Grove, CA 92642-3005 (714) 638-9000, ext. 3830
■ State of Hawaii <i>Ongoing</i>	1989	17	Ed Uchida State of Hawaii, Dept. of Transportation 600 Kapiolani Blvd., Room 306 Honolulu, HI 96813 (808) 548-6526 <i>Neighborhood Work Centers: Public &amp; Private Sectors</i>



## Resources: Telecommuting Programs and Contacts

(continued)

Organization Program Status	Duration	Approximate No. Participants*	Contact Name Comments
■ State of California <i>Program expanding</i>	Pilot started 1987	1,000	David Fleming Department of General Services 601 Sequoia Pacific Sacramento, CA 95814 (916) 324-1739
■ State of Washington <i>Planning</i>	1990-91 (two years)	300	Michael Farley Washington State Energy Office 809 Legion Way SE, FA-11 Olympia, WA 98504-1211 (206) 956-2040 <i>Neighborhood Work Centers: Focus on Private Sectors</i>
■ The Travellers <i>Ongoing</i>	1987-	70	John McCarthy The Travellers One Tower Square, 3MN Hartford, CT 06183 (203) 277-6199
■ University of California, Davis <i>Planning</i>	1991-	Not known	Joel Kugelmass Telecommunications Office University of California, Davis Davis, CA 95616 (916) 752-2789

\*The approximate number of telecommuters now. In most cases, this number will grow over time.

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## **Case Study: Pacific Bell Corporation**

### **Background**

Pacific Bell started its telecommuting program during the 1984 Olympics to help ease expected traffic congestion. Originally, Pacific Bell had 75 people working at home and 22 working at two satellite offices. As of July, 1989, the company had nearly 600 people working at home and 25 working at satellite offices. An additional 400 employees telecommute on an informal basis.

Professional staff and managers may participate, at the discretion of their supervisors.

Pacific Bell encourages participants to use equipment that best suits their job requirements. They have access to a local area network, a system that provides electronic mail, calendaring, conferencing, multiple main-frame computer access and voice mail.

### **Program Evaluation**

According to a January, 1988 survey of Pacific Bell telecommuters and their supervisors:

- More than 80 percent of all telecommuters considered themselves successful. Nearly all said they are satisfied with telecommuting.
- Telecommuters said they produce more work, have fewer distractions and are able to "work in their own way." Some reported disadvantages, including a lack of support tools (such as clerical and equipment), reduced interaction with co-workers and working too much.
- More than 60 percent of managers said that managing telecommuters is no different than managing in-office employees. Only 25 percent felt it is more difficult (citing assessing work performance, communications difficulties and maintaining a sense of teamwork as the reasons).
- Two-thirds of managers said that productivity increased because employees are more satisfied with their jobs.

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## **Case Study: The County of Los Angeles**

### **Background**

Los Angeles County's telecommuting program is considered to be one of the most successful in the nation. Started in August, 1989, it involves more than 1,000 participants—from lower level clerical staff to upper management. Within five years, the County expects to have several thousand telecommuters.

All telecommuters are volunteers. Most telecommute one to three days per week.

Eight departments within the County now participate and many more are evaluating the potential for telecommuting. Each department decides what equipment, if any, it will purchase for telecommuters. The County lets employees purchase equipment at a discount.

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**County of Los Angeles:**  
**Background**  
(continued)

Supervisors of telecommuters are trained to manage by results. The County encourages frequent communication to ensure that tasks and performance expectations are clearly defined. If an employee fails to meet goals, he or she may lose the privilege to telecommute.

- Each department within the County decides how it will implement the telecommuting program to meet its needs.
- Most participants currently telecommute from home. Satellite offices will be set up in the future.
- An employee's duties, obligations, responsibilities and condition of employment with the County do not change, nor does his or her salary, retirement benefits and County-sponsored insurance coverage.
- If an employee uses his or her own equipment, the employee is responsible for maintenance and repair.
- Telecommuting employees are covered under Workers' Compensation for job-related accidents.

**Program Evaluation**

The County is conducting a survey to determine how successfully the telecommuting program has improved traffic conditions, increased employee productivity and reduced County costs. Results of the study are expected in late 1991.

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**Case Study:**  
**Hawaii Telework Center**

**Background**

The Hawaii Telework Center is a public and private sector joint venture undertaken to test the concept of telecommuting at a neighborhood work center.

The center, located on the island of Oahu, started operation in July, 1989. The Hawaii State Department of Transportation coordinates the project.

The state legislature passed a bill that gave \$125,000 to run the neighborhood work center for one year (from July 1, 1988 to June 30, 1989) and included the following requirements:

- Participation of eight private and eight public sector employees.
- Private matching funds.
- A one-year demonstration period.
- A report to the 1989 Hawaii state legislative session.

A telework task force was organized at the start of the program. It included executives from the public and private sector as well as faculty

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**Hawaii Telework Center:  
Background  
(continued)**

from the University of Hawaii. The task force established the following objectives for the telework project:

- Plan, organize and implement a pilot project for at least one year.
- Utilize state-of-the-art technology.
- Publicize the project to generate interest in remote work applications.
- Gain experience in designing and operating future satellite offices.
- Evaluate telework employee performance including benefits, drawbacks and overall effectiveness.

Private firms provided more than \$300,000 of computers and other equipment. A local developer provided 2,000 square feet of office space at a discounted lease price.

**Main Guidelines**

- The work stations are assigned and unique to each employer.
- All general supplies are provided by the Center. The employees bring their own desk supplies.
- Most employees use the Center five days a week.
- Employees must live in the surrounding area to participate.
- The Center provides a facility administrator.
- Equipment use is not monitored. There has been no problem with abuse.

**Program Evaluation**

While traffic reduction was the primary objective for evaluating this telecommuting project, quality of life improvements emerged as the most significant benefit. Overall, the program:

- Increased amount of time for families.
- Reduced traffic and use of fuel.
- Reduced office rental and parking space.

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**Case Study:  
The State of California  
Pilot Project**

The State of California began planning its telecommuting pilot project in 1985 and ran it until January, 1990. Roughly 150 telecommuters, representing 14 State agencies, participated in this project. Nearly three-quarters of the participants considered themselves "professionals."



**California Pilot Project**  
(continued)

The State's primary objectives were to:

- Assess how telecommuting affects the delivery of existing State services.
- Explore the possibility of new State services made possible by telecommuting.
- Determine how telecommuting affects employees and their managers.
- Evaluate whether telecommuting enhanced or improved employment opportunities for people with disabilities.
- Test a results-oriented management approach.
- Develop tools for selecting, training and evaluating telecommuters and their supervisors.
- Estimate how well telecommuting has helped reduce traffic congestion, air pollution and energy use.
- Develop guidelines to expand telecommuting in State government.
- Test ways to share office space and reduce the overall need for space.

**Program Evaluation**

The project met or exceeded all of its key success criteria, most notably:

- Telecommuter work effectiveness fulfilled or exceeded expectations.
- Telecommuting enhanced the overall quality of work life for telecommuters, including those with disabilities.
- Results-oriented management techniques worked well for telecommuters as well as non-telecommuters.
- People who telecommuted did, in fact, drive less.

They also drew the following conclusions:

- Support is vital—from senior management on down. Also, a company needs a "telecommuting champion," one person who keeps interest in the project going throughout the start-up period.
- Telecommuters and their supervisors must be volunteers.
- Participant screening is important.
- Adequate training is necessary.
- Major capital investments are not necessary.

## **Sample Telecommuting Policy**

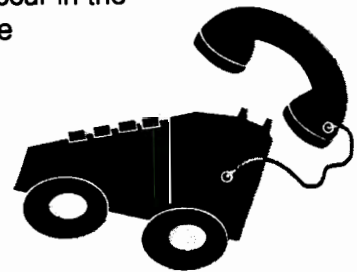
Telecommuting, the practice of working at home or at a site near the home instead of physically traveling to a central workplace, is a work alternative that this organization may offer to some employees when it would benefit both the organization and the employee.

Telecommuting is not a formal, universal employee benefit but an alternative method of meeting the needs of the company. Since telecommuting is a privilege, the organization has the right to refuse to make telecommuting available to an employee and to terminate a telecommuting arrangement at any time.

Employees are not required to telecommute. Employees have the right to refuse to telecommute if the option is made available to them. Employees who do choose to telecommute have the right to cease telecommuting and return to their former in-office work pattern at any time.

The responsibilities assumed by the organization under this agreement are as follows:

- The employee's compensation, benefits, work status and work responsibilities will not change due to participation in the telecommuting program.
- The amount of time the employee is expected to work per day or per pay period will not change due to participation in the telecommuting program.
- The employee's at-home work space will be considered an extension of the company work space. Therefore, the organization will continue to be liable for job-related accidents that occur in the employee's at-home work space during the employee's working hours.
- The organization will be liable for injuries or illnesses that occur during the employee's agreed-upon work hours. The employee's at-home work hours will conform to a schedule agreed upon by the employee and his or her supervisor. If such a schedule has not been agreed upon, the employee's work hours will be assumed to be the same as it was before the employee began telecommuting.
- The organization assumes no liability for injuries occurring in the employee's at-home work space outside the agreed-upon work hours.



The responsibilities assumed by the undersigned employee under this agreement are as follows:

- The employee agrees to maintain safe conditions in the at-home work space, and to practice the same safety habits in the designated at-home workplace as he or she would in his or her office on the organization's premises.

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**Sample Telecommuting  
Policy**  
(continued)

- In the case of an injury while working at home, the employee will immediately report the injury to his or her supervisor or to Employee Relations to get instructions for obtaining medical treatment.
- Restricted-access materials, such as payroll records, will not be taken home without the written consent of the employee's supervisor.
- The employee will not undertake to provide primary care for a child under 12 years of age during at-home working hours. If such children will be in the home during the employee's at-home working hours, some other individual must be present to provide primary care for those children. However, if a child under 12 is ill, the employee may on a temporary basis provide primary care for that child, subject to the approval of the employee's supervisor.

The employee will also not undertake to provide primary care for an elderly adult, who would otherwise require the care of a nurse, while working at home.

- The employee will work at home during the hours agreed upon by the employee and his or her supervisor. Changes to this schedule will be reviewed and approved in advance by the employee's supervisor.



## **Sample Telecommuting Agreement**

*This sample was developed by Pacific Bell.*

This Agreement, effective \_\_\_\_\_, is between \_\_\_\_\_, an employee of \_\_\_\_\_ (hereinafter referred to as "Employee"), and \_\_\_\_\_ (hereinafter referred to as "Company"). The parties, intending to be legally bound, agree as follows:

### **Scope of Agreement**

Employee agrees to perform services for Company as a "Telecommuter." Employee agrees that telecommuting is voluntary and may be terminated at any time, by either Company or the Employee, with or without cause.

Other than those duties and obligations expressly imposed on Employee under this agreement, the duties, obligations, responsibilities and conditions of Employee's employment with Company remain unchanged. Employee's participation in Employee salary, pension, benefit and Company-sponsored insurance plans shall remain unchanged.

The terms "remote work location" or "remote workplace" shall mean Employee's residence or any remote office location approved by Employee's department. The term "central office workplace" shall mean Employee's district office or Employee's usual and customary Company work address.

### **Term of Agreement**

This Agreement shall become effective as of the date first written above, and shall remain in full force and effect as long as Employee telecommutes, unless sooner terminated.

### **Termination of Agreement**

Employee's participation as a telecommuter is entirely voluntary and is available only to employees deemed eligible at Company's sole discretion. There exists no right to telecommute. Either party may terminate Employee's participation as a telecommuter, with or without cause, upon reasonable notice thereof, in writing, to the other. Company will not be held responsible for costs, damages or losses resulting from cessation of participation as a telecommuter. This writing is not a contract of employment and may not be construed as such.

### **Compensation**

*Work Hours, Overtime, Vacations:* Employee agrees that work hours, overtime compensation and vacation schedule will conform to the terms agreed upon by Employee and Company.

### **Telecommuting and Incidental Equipment**

Employee agrees that use of equipment, software, data supplies and furniture, provided by Company for use at the remote work location, is limited to authorized persons and for purposes relating to the business, including self-development, training and tasks.

Company, at its sole discretion, may choose to purchase equipment and related supplies for use by Employee while telecommuting or permit the use of Employee-owned equipment. The decision as to the type, nature,

**Telecommuting and  
Incidental Equipment**  
(continued)

function and/or quality of electronic hardware (including, but not limited to, computers, video display terminals, printers, modems, data processors and other terminal equipment), computer software, data and telecommunications equipment (i.e., phone lines) shall rest entirely with Company. The decision to remove or discontinue use of such equipment, data and/or software shall rest entirely with Company. Equipment purchased for use by Employee shall remain the property of Company. Company does not assume liability for loss, damage or wear of Employee-owned equipment.

Employee agrees to designate a work space within Employee's remote work location for placement and installation of equipment to be used in the projects. Employee shall maintain this workspace in a safe condition, free from hazards and other dangers to Employee and equipment. The site chosen as Employee's remote workplace must be approved by Company.

Employee agrees that Company may make on-site visits to the remote work location for the purpose of determining that the site is safe and free from hazards, and to maintain, repair, inspect or retrieve Company-owned equipment, software, data and/or supplies. In the event legal action is necessary to regain possession of Company-owned equipment, software data and/or supplies, Employee agrees to pay all cost of suit incurred by Company, including attorneys' fees, should Company prevail.

In the event of equipment failure or malfunction, Employee agrees to immediately notify Company in order to effect immediate repair or replacement of such equipment. In the event of delay in repair or replacement, or any other circumstance under which it would be impossible for Employee to telecommute, Employee understands that Employee may be assigned to do other work and/or assigned to another location, at Company's sole discretion.

Furniture, lighting, environmental protection and household safety equipment incidental to use of Company-owned equipment, software and supplies shall be appropriate for their intended use and shall be used and maintained in a safe condition, free from defects and hazards.

**Liability for Injuries**

Employee understands that Employee remains liable for injuries to third persons and/or members of Employee's family on Employee's premises. Employee agrees to defend, indemnify and hold harmless Company, its affiliates, employees, contractors and agents from and against any and all claims, demands or liability (including any related losses, costs, expenses and attorneys' fees) resulting from or arising in connection with any injury to persons (including death) or damage to property, caused directly or indirectly, by the services provided hereunder by Employee or by Employee's willful misconduct or negligent acts or omissions in the performance of Employee's duties and obligations under this Agreement, except where such claims, demands or liability arise solely from the gross negligence or willful misconduct of Company.

***Inventions and  
Trade Secrets***

Employee acknowledges that, as a result of Employee's employment, Employee will have access to information constituting trade secrets of Company. Employee agrees to hold such trade secrets in confidence and trust and agrees not to use them for Employee's own account or to disclose them to any other person(s) including, but not limited to, competitors of Company either during the term of Employee's employment or thereafter.

"Trade secrets" as used in this Agreement includes, but is not limited to, any and all confidential or proprietary information of Company (or of third persons in Company's possession) which is or may be used in Company's business which might give Company an opportunity to obtain an advantage over competitors who do not know or use such information and any other to protect, regardless of whether any such information is marked as being trade secrets or was made known to Employee by Company prior or subsequent to the execution of this Agreement.

Employee agrees that all Company-owned data, software, equipment, facilities and supplies must be properly protected and secured. Company-owned data, software, equipment, facilities and supplies must not be used to create Employee-owned software or personal data. Employee will comply with all Company policies and instructions regarding conflicts of interest, trade secrets, inventions and confidentiality. Any software, products or data created as a result of work-related activities are owned by Company and must be produced in the approved format and medium. Employee agrees that on termination of employment Employee will return to Company all things belonging to Company, including all notes, data reference materials, sketches, drawings, memoranda, reports, records, magnetic tapes and all other documents in Employee's possession or control which in any way incorporate or reflect any of Company's trade secrets.

Employee shall promptly disclose in writing to Company all inventions of Employee. Employee shall not disclose any such invention to any other person without the express prior written consent of Company.

Employee shall keep and maintain adequate and written records of all inventions of Employee in the form of notes, sketches drawings or such other form as Company may specify. Such records shall be available to and be the sole property of Company at all times.

Employee hereby assigns to Company all of Employee's rights, title, and interest in and to all inventions. Employee agrees not to use such inventions for Employee's own account or to disclose any such inventions to third persons without the express prior written consent of Company. Employee agrees, both during and after Employee's employment, to assist Company in preparing patent applications, to execute all documents and to do all things which Company believes necessary or appropriate to obtain patents or registration in connection with such inventions in the United States and foreign countries and to vest in Company or Company's designee full title thereto, all at Company's expense, but for no consideration to Employee in addition to Employee's salary or wages. If Company requires Employee's assistance under this paragraph after



***Inventions and  
Trade Secrets  
(continued)***

termination of Employee's employment, Company shall compensate Employee for time actually spent in providing such assistance at an hourly rate equivalent to Employee's salary or wages during the last period of such employment.

For the purposes of this Agreement, the term "invention" includes, but is not limited to, any idea, concept, process, discovery, device, machine, manufacture, method, use, apparatus, technique, know-how, composition of matter, material, design or improvement of any of the foregoing, whether patentable or not, made or conceived by Employee, solely or jointly with others, during the term of Employee's employment, except for any idea or invention for which no equipment, supplies, facility or trade secret information of Company was used and which was developed entirely on Employee's own time, and which either (a) does not relate either to the business of Company or to Company's actual or demonstrably anticipated research or development, or (b) does not result from any work performed by Employee for Company.

***Miscellaneous Conditions***

Employee agrees to participate in all studies, inquiries, reports or analyses relating to telecommuting for Company, including inquiries which employee might consider personal or privileged. Company agrees that Employee's individual responses shall remain anonymous on request by Employee, but that such data may be compiled and made available to the general public without identification of Employee.

Employee remains obligated to comply with all Company rules, policies, practices, instructions, and this Agreement and understands that violation of such may result in a preclusion from telecommuting and/or disciplinary action, up to and including termination of employment.

I affirm by my signature below that I have read this agreement and understand its subject matter. I affirm that I was given the opportunity to have this agreement reviewed by my own counsel prior to entering into it.

***Employee's Signature*** \_\_\_\_\_ ***Date*** \_\_\_\_\_

**Sample  
Telecommuter's  
Assignment**

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

Telecommuting is not an employee benefit, but rather is an alternate method of meeting the needs of this Company. Employees do not have a "right" to telecommute; the arrangement can be terminated by either the employee or the Company at any time.

These are the conditions for telecommuting agreed upon by the telecommuter and his or her supervisor:

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

\_\_\_\_\_

2. The employee will telecommute \_\_\_\_\_ days per week.

3. The employee's work hours will be as follows:

\_\_\_\_\_

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

\_\_\_\_\_

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

\_\_\_\_\_

6. The following is the arrangement agreed upon for handling telephone calls made by the telecommuter from the remote work location for Company business:

\_\_\_\_\_

7. The employee agrees to call the central office to obtain his or her messages at least \_\_\_\_\_ times per day.

8. The employee agrees to obtain from the central office all supplies needed for work at the alternate location; out-of-pocket expenses for supplies regularly available at the Company office will not normally be reimbursed.

**Sample Telecommuter's  
Assignment  
(continued)**

9. Additional conditions agreed upon by the telecommuter and the supervisor are as follows:

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I have reviewed the above material with \_\_\_\_\_ prior to his or her participation in the Company's telecommuting program.

---

**Date**

**Supervisor**

The above material has been discussed with me.

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**Date**

**Employee**



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## ***Answers to Common Telecommuting Questions***

***How do I know that the telecommuters are really working?***

The employee's completed work product is the indicator that he or she is working. Managers of telecommuters must focus on the quality, quantity and timeliness of the work product, rather than on the process the telecommuter used to achieve the end result. Managers must manage by objectives or results, rather than by observation. The manager and the employee should establish the employee's goals and objectives together.

***Will the employees work less if they are working at home unsupervised?***

No. Survey results show marked improvements in productivity. Productivity increases because employees have fewer distractions and interruptions, work at their best times, and are less stressed due to the absence of the commute to work.

***How will managers know how to supervise telecommuters?***

Telecommuting presents an opportunity for managers to become better managers. By focusing on the employee's work product, managers will increase their own organizational skills and their own skill in managing by objectives. Managers of telecommuters will be given training on managing remote employees.

***Won't loyalty to the organization diminish?***

No. In actuality, loyalty is likely to improve since employees are happier with their working conditions. Employee morale also improves as a result of telecommuting.

***Is this program only for employees who use and/or have computers?***

No. A computer is not mandatory to be a successful telecommuter. The minimum equipment necessary to participate in the program is a telephone. Many successful telecommuters use only pencil and paper to perform their duties.

***How can social interaction be maintained to keep telecommuters from feeling isolated from their colleagues?***

There are many techniques for overcoming feelings of isolation. These include part-time telecommuting, core days in the office and frequent communication by telephone or voice mail. The telecommuters should be included in all scheduled meetings and events.





**What are the issues the telecommuters should be aware of?**

- **Coping with Interruptions:**  
Often friends, neighbors and family members do not realize that a telecommuter is working. Although an occasional interruption may be welcome, telecommuters must learn to keep interruptions to a minimum.
- **Working Long Hours:**  
Telecommuters need to be aware of the tendency to work long hours and the need to take regular breaks.
- **Exercising Self-Control:**  
If telecommuters find themselves procrastinating, they should evaluate their work habits and make necessary changes to ensure productivity.
- **Designating Space:**  
A designated work area is recommended for telecommuting. A separate work space may mean fewer distractions or interruptions and a higher level of discipline and organization.
- **Gaining Support:**  
A family's or supervisor's attitude may sometimes be detrimental to a telecommuting arrangement. Telecommuters must work to gain the support and understanding of those around them.

**What happens if the employee is hurt at home while working?**

If the employee is hurt while working, he or she is covered for worker's compensation, just as if at the regular place of business.

**Is telecommuting a substitute for child or elder care?**

No. A telecommuter must focus on his or her job, not handle demanding child or elder care situations. However, telecommuters are better able to manage their work/family schedules because they have greater flexibility in their work hours. In some cases new mothers are able to work on a part time basis, i.e., 20 hours per week while the baby is sleeping, thus allowing the employee to reduce the length of her maternity leave and enabling the department to continue to have the services of that employee.

**Can telecommuting result in reduced use of sick leave?**

Yes. An employee working in the regular office usually has to use a half day of sick time to get to a doctor or dental appointment. A telecommuter can take an hour or two off for the appointment and then work that time later in the day or the week, thus not using any sick time. Also, often an employee that does not feel well enough to drive to the office can work some hours at home.

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***Will the need for overtime decrease as a result of telecommuting?***

With telecommuting, employee productivity generally increases, which could reduce overtime.

***Is it possible to restructure a job so that the employee can successfully telecommute?***

Yes. Most jobs are suitable for telecommuting part-time. An employee can organize his or her work to combine all the telecommutable tasks (such as reading, writing, data or word processing, and conducting business by telephone) into the days worked at home. The employee schedules meetings for his or her days in the office.

***How do you manage the employees who are not telecommuting?***

It is important to include the non-telecommuters in your planning process. Specific guidelines should be established regarding how the work load is distributed while the telecommuters are telecommuting so as not to overload the non-telecommuters. Also, all employees should have a clear understanding of the selection criteria for telecommuters to minimize feelings of resentment over who was and who was not selected to participate in the program.



## Selection Survey for Employees

Telecommuting or working at a location other than the conventional office, by itself, or used in conjunction with double shifting, can result in benefits for both the Company and its employees. These benefits can include: increased productivity, reduced overhead, improved morale, reduced stress and cost savings for employees and the Company.

The attached questionnaire must be completed by each person interested in participating in the Company telecommuting program. Every supervisor/manager must also fill out a similar questionnaire on their employees who are interested in telecommuting. The results of both the employee and supervisor questionnaires can be used for selecting the potential telecommuter.

## Telecommuting Screening Survey for Employees

Name \_\_\_\_\_

Supervisor \_\_\_\_\_ Classification \_\_\_\_\_ Department \_\_\_\_\_

1a. In five lines or less, describe what you currently do.

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1b. In five lines or less, describe how your current job can be adapted to telecommuting to better meet the goals and mission of your department.

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1c. The following four groups of characteristics relate respectively to your existing work, to your future work as it can be adapted to telecommuting, to you as an employee, and to your manager. Please rate each characteristic as either high (H), medium (M), or low (L) by checking the appropriate blank.

### Existing Work Characteristics

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

- Amount of face-to-face contact required
- Ability to organize required face-to-face communications (e.g. meetings) into pre-determined time periods
- Degree of telephone communications required
- Clarity of objectives for a given work effort
- Autonomy of operation
- Ability to control and schedule work flow
- Amount of in-office reference material required

High	Med.	Low

**Telecommuting Screening  
Survey for Employees**  
(continued)

**Future Work as a Telecommuter**

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

- Amount of face-to-face contact required
- Ability to organize required face-to-face communications (e.g. meetings) into pre-determined time periods
- Degree of telephone communications required
- Clarity of objectives for a given work effort
- Autonomy of operation
- Ability to control and schedule work flow
- Amount of in-office reference material required

High	Med.	Low

**Employee Characteristics**

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

- Need for supervision, frequent feedback
- Quality of organization and planning skills
- Importance of co-workers' input to work function
- Discipline regarding work
- Reliability concerning work hours
- Computer literacy level
- Desire/need to be around people
- Desire for scheduling flexibility for any reason
- Potential friction at home if telecommuting (e.g., interruptions due to caring for sick child or spouse)
- Level of job knowledge
- Productivity
- Quality of Work

High	Med.	Low

**Supervisor Characteristics**

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

- Positive attitude toward telecommuting
- Trust employee's ability to telecommute
- Organization and planning skills
- Ability to establish clear objectives
- Provide formal feedback regularly
- Flexibility
- Ability to communicate with employees
- Result and project-oriented rather than activity or process-oriented. (Manages by results, not by process)

High	Med.	Low

**Telecommuting Screening  
Survey for Employees**  
(continued)

2. What criteria are used by your manager to evaluate your work? (For example: quality of work, quantity of work, timeliness, etc. Please be specific.)
- \_\_\_\_\_
- \_\_\_\_\_
3. Do you need physical security of the information, data and materials they work with?
- (a) Yes (Answer question 4)
- (b) No (Go to question 5)
- (c) Not applicable (Go to question 5)
4. As telecommuters, how can you maintain the security of your information? (Please be specific.)
- \_\_\_\_\_
- \_\_\_\_\_
5. Considering the nature of your job, how much would you want to telecommute? (Circle one only)
- (a) About once every 2 weeks                      (d) Three days a week
- (b) About once a week                                (e) Occasionally for a special project
- (c) Two days a week
6. What kinds of work would you expect to do while telecommuting? (Circle as many as apply.)
- (a) Writing/typing                                      (f) Research
- (b) Word processing                                    (g) Talking on the phone
- (c) Data management/  
computer programming                              (h) Sending/receiving electronic mail
- (d) Administrative                                      (i) Field visits
- (e) Reading    (j) Thinking/planning
- (k) Other (please specify)
7. Given the amount of telecommuting you want to do, and the kinds of work you would do while telecommuting, what equipment/services would you need, and which of those do you currently have? (Check appropriate box.)
- |                                     | <i>Need</i>              | <i>Currently Have</i>    |
|-------------------------------------|--------------------------|--------------------------|
| Computer/terminal                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Printer                             | <input type="checkbox"/> | <input type="checkbox"/> |
| Modem                               | <input type="checkbox"/> | <input type="checkbox"/> |
| Additional phone line               | <input type="checkbox"/> | <input type="checkbox"/> |
| Software                            | <input type="checkbox"/> | <input type="checkbox"/> |
| Typewriter                          | <input type="checkbox"/> | <input type="checkbox"/> |
| Desk, filing space, other furniture | <input type="checkbox"/> | <input type="checkbox"/> |
| Facsimile machine                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Voice Mail                          | <input type="checkbox"/> | <input type="checkbox"/> |
| Other (please specify)              | <input type="checkbox"/> | <input type="checkbox"/> |

**Telecommuting Screening  
Survey for Employees**  
(continued)

8. Do you work from home at all now, or have you done so regularly in the past (counting overtime)?
- (a) Yes (b) No (Go to question 11)
9. If so, approximately how much? (Circle one only.)
- (a) Less than one day/month (f) Three days a week  
(b) One day/month (g) Four days a week  
(c) About once every two weeks (h) All the time, with weekly office visits  
(d) About once a week (i) Several hours a day  
(e) Two days a week
10. How long have you worked from home?
- (a) More than a year (c) Three to six months  
(b) Six months to a year (d) Less than three months
11. Do you have adequate space in your home to dedicate to working?
- (a) Yes (b) No
12. Are there any distractions/obligations that will make working at home difficult or impossible?
- (a) Yes (b) No
13. In your opinion, after reviewing the information provided, do you consider yourself a suitable candidate for telecommuting?
- (a) Yes (b) No  
(c) Need more information (Please specify)



## **Selection Survey for Supervisors**

### **Telecommuting Screening Survey for Supervisors**

Telecommuting or working at a location other than the conventional office, by itself, or used in conjunction with double shifting, can result in benefits for both the Company and its employees. These benefits can include: increased productivity, reduced overhead, improved morale, reduced stress and cost savings for employees and the Company.

Every supervisor/manager must fill out a questionnaire on their employees who are interested in telecommuting. The results of both the employee and the supervisor questionnaires can be used for selecting the potential telecommuter.

Name \_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_

1. Is the work done by any of your staff as it currently exists or with modifications suitable for telecommuting, at least part of the time?
  - (a) Yes
  - (b) No (This completes the survey for you—thanks!)
  
2. Do you want to participate in this program as a supervisor of telecommuters?
  - (a) Yes (Go to question 4a)
  - (b) No (Go to question 3)
  
3. If not, why not? (Please circle any that apply).
  - (a) I am not willing to meet the requirements for participating in the program. (For example, supervision of remote employees, evaluating employees on basis of work products, etc.)
  - (b) I am opposed to making telecommuting available for anyone.
  - (c) I believe the incentive to "goof off" while telecommuting would be too strong.
  - (d) I don't want to have to defend the decision that some of my staff are allowed to telecommute, while others are not.
  - (e) I believe there's no good way of assessing productivity changes due to telecommuting.
  - (f) It is not fair to the employees not permitted to telecommute.
  - (g) Other (please specify) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

(This completes the survey for you—thanks!)

- 4a. In five lines or less, describe the kind of work your employee(s) do(es).

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**Telecommuting Screening  
Survey for Supervisors**  
(continued)

4b. In five lines or less, describe how the work of your employee(s) can be adapted to telecommuting to better meet the goals/mission of your department.

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The rest of the survey should be completed for each of your employees who are interested in participating in the telecommuting program. Some questions, such as those dealing with your management style, will probably have the same answers for each employee. In this case, place a check in the most appropriate blank. Please rate each characteristic as either high (H), medium (M), or low (L).

Some questions, however, will inevitably have different answers for different employees. Please put the initials of each employee in the appropriate blanks, or duplicate this form for each employee.

For example, if you have three interested employees, with initials U.V., W.X., and Y.Z., your response to the first question below might look like this:

Amount of face-to-face communications required

High	Med.	Low
	<input checked="" type="checkbox"/>	<input type="checkbox"/>

4c. The following four groups of characteristics relate respectively to the existing work, the type of work that can be done when telecommuting, to the employee, and to the supervisor. (Please rate each as either high, medium or low).

**Work Characteristics**

*Please rate the following according to job requirements and characteristics of potential telecommuters.*

- Amount of face-to-face contact required
- Ability to organize required face-to-face communications (e.g. meetings) into pre-determined time periods
- Degree of telephone communications required
- Clarity of objectives for a given work effort
- Autonomy of operation
- Ability to control and schedule work flow
- Amount of in-office reference material required

High	Med.	Low
		<input checked="" type="checkbox"/>

**Future Work as a Telecommuter**

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

- Amount of face-to-face contact required
- Ability to organize required face-to-face communications (e.g. meetings) into pre-determined time periods
- Degree of telephone communications required
- Clarity of objectives for a given work effort
- Autonomy of operation
- Ability to control and schedule work flow
- Amount of in-office reference material required

High	Med.	Low
		<input checked="" type="checkbox"/>

**Telecommuting Screening Survey for Supervisors**  
(continued)

**Employee Characteristics**

Please rate the following according to the potential telecommuter's characteristics as an employee.

- Need for supervision, frequent feedback
- Quality of organization and planning skills
- Importance of co-workers' input to work function
- Discipline regarding work
- Computer literacy level
- Degree of experience in current assignment
- Level of job knowledge
- Productivity
- Quality of Work

High	Med.	Low

**Supervisor Characteristics**

Please rate the following according to your own characteristics as a supervisor.

- Positive attitude toward telecommuting
- Trust employee's ability to telecommute
- Organization and planning skills
- Ability to establish clear objectives
- Provide formal feedback regularly
- Flexibility
- Ability to communicate with employees
- Result and product-oriented rather than activity or process-oriented

High	Med.	Low

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

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6. Do all or some of your staff need physical security of the information, data and materials they work with?

- (a) Yes
- (b) No (Go to question 8)
- (c) Not applicable (Go to question 8)

7. How can the physical security of the information your employees work with as telecommuters be maintained? (Please be specific.)

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**Telecommuting Screening  
Survey for Supervisors**  
(continued)

8. Considering the nature of your staff's work, what is the maximum amount you would want each of them to telecommute? (Feel free to write initials of employees next to each category.)
- (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
  - (f) Not at all
9. What kinds of work would you expect your staff to do while telecommuting?
- (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)
10. Given the nature of your staff's work, what equipment would each one need in order to telecommute the amount you proposed for them in question 8?
- (a) Computer/terminal
  - (b) Printer
  - (c) Modem
  - (d) Additional phone line
  - (e) Software
  - (f) Typewriter
  - (g) Desk, filing space, other furniture
  - (h) Facsimile machine
  - (i) Voice mail
  - (j) Other (please specify)
11. Do any of your staff work from home at all now (counting overtime)?
- (a) Yes
  - (b) No (Go to question 13)
12. If so, how much?
- (a) Less than one day/month
  - (b) One day/month
  - (c) About once every two weeks
  - (d) About once a week
  - (e) Two days a week
  - (f) Three days a week
  - (g) Four days a week
  - (h) All the time, with weekly office visits
  - (i) Several hours a day
13. Please rate each of your interested staff in terms of your willingness to let them telecommute:
- (a) Not at all willing
  - (b) Have reservations, but willing on a trial basis
  - (c) Completely willing

Initials

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## **A Note on Computer Viruses**

### **What Are Viruses?**

Your organization's information systems (IS) staff will undoubtedly help develop and implement your telecommuting program. They may be concerned about software viruses being brought from computers that employees have at home into your organization's computers. While you probably won't want to take the time to become an expert on software viruses, you will need to be able to answer concerns about software viruses if they are brought up.

Viruses are small computer programs that are designed to replicate themselves into other computers. They copy themselves into other programs used by a computer and then begin affecting the operation of the computer. Part of the danger of viruses is the fact that they don't necessarily have an immediate effect on a computer that they infect; some of them wait for a user to take a specific action, like asking for a directory listing, or wait until a specific date, like Friday the 13th.

Once a virus has entered a computer, it can infect three areas:

- The boot sector, found on a hard disk and on a start-up disk for a floppy-only PC.
- Applications programs, like a spreadsheet or word processing program.
- A computer's operating system.

### **How Are Viruses Transmitted?**

Computer users often help spread viruses without realizing it, most commonly by passing infected floppy disks between computers. Many computer users make copies of programs and pass them around among friends and coworkers. This practice, which is usually illegal, accelerates the spread of viruses.

Viruses can also be transmitted over telephone lines or downloaded from electronic bulletin boards (although most bulletin board operators now carefully check programs for viruses).

### **How Common Are Viruses?**

Viruses *do* exist, and the media reports have frightened many computer users. (One report in particular told of a university student who caused \$98 million in damage and potentially threatened national security.) However, viruses are not as common as it might seem. Many people mistake everyday computer problems for virus infections. A study of reports of virus infections found that only 4 percent of the reported problems were actually the result of viruses. The rest were the result of operator error, hardware problems, bugs in applications programs and other problems.

Home-based telecommuting probably poses very little additional danger of a virus being introduced into your organization's computers. Typically, telecommuters will take diskettes containing data files home with them, work on them at home, and then bring them back into the office. These diskettes will contain only data files, like word processing documents and spreadsheet files. Since they will not contain any executable program code, it is very unlikely that they can transmit a virus from an employee's own PC to a computer in the office.

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## **What is Our Risk?**

If telecommuters will be transmitting files from home to the office and back over the telephone, the danger of virus transmission is somewhat greater—but still not likely.

Telecommuting programs around the country, including those operated by the State of California and the County of Los Angeles, have allowed hundreds—if not thousands—of people to work at home, using their own computers, without any apparent problems. There are probably also many people in your organization who commonly take work home with them at night or on weekends, finish it up on their own PCs, and bring it back to work. The odds are that this practice hasn't caused any problems.

## **Dealing With Viruses**

There is nothing that will provide perfect security against viruses. Your IS staff may object to telecommuting because of the danger of viruses. You will need to impress on them that telecommuting is a part of the organization's operating plans (this is one area in which prior approval from upper management is essential) and that you will all need to work together to provide a reasonable amount of security without interfering with those plans. It might also help if you present the telecommuting program as an opportunity to institute virus protection measure throughout the organization.

The security steps you suggest should consist of:

### **1. Education and prevention.**

Educate computer users on the dangers posed by viruses, how they are transmitted, and how to avoid them. Most users will want to avoid practices that threaten the PCs on which they rely at work and the PCs at home for which they probably paid several thousand dollars. Ask your IS staff to help you develop a brief training program on viruses and safe computing procedures. This training can be presented as part of the training for telecommuters and presented separately to other PC users in your organization.

### **2. Preparation for an infection.**

Work with your IS staff to develop a program that will minimize the damage from any infection that does occur including:

- Providing a backup system for each PC and making sure that all PC users follow proper backup procedures.
- Acquiring one of the many software packages now available for identifying and eliminating viruses.
- Posting an emergency phone number that users can call if they experience problems that might be related to a virus.

Your IS staff may already have a preventive maintenance program for PCs. If so, they might also make scanning for viruses on hard disks a part of their routine maintenance procedures.



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## **Setting Up A Home Office**

### **The Desk**

Observe the "travel patterns" in and around the work area, and select a location that is safe, efficient, and comfortable. When designing a home office, your main considerations will be:

Conventional desk surfaces are usually 29 inches high, but you should choose whatever height feels most comfortable. Twenty-six inches is the recommended height for computing surfaces. The desk should be sturdy enough to handle the weight of any peripheral equipment (such as computers, printers, fax machines, etc.).

### **The Chair**

The seat should be adjustable, and the height of the top surface of the seat to the floor should be 15 to 21 inches. Both the height and the angle of the backrest should be adjustable, and it should provide support to the back of the waist. Remember, you may be sitting in the chair all day.

### **The Lighting**

Whether you use natural or artificial lighting, it should be directed toward the side, or behind the line of vision, not in front or above it. 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**

- Cover interconnecting cables or ensure that they are placed out of the way so no one trips on them.
- Position equipment close to electrical outlets. Connect equipment such as computers, printers, and fax machines to a surge protector/master switch.
- Provide sufficient air space around electronic components.
- Keep equipment out of direct sunlight and away from heaters.
- Place heavy items on sturdy stands close to walls.
- Make sure that there are enough electrical outlets in the room. You may need a separate circuit so you don't overload the existing electrical system. If necessary, consult the local power utility.

### **Noise**

Surprisingly, no noise can be just as stressful as too much noise in the work environment. Background sound, like music or white noise, can keep your productivity up and help reduce boredom. However, be sure to keep distracting sounds, such as crying children, the television, outside noises like traffic or lawn mowers to a minimum. Use a room divider or screen or simply shut the door or window.

### **Protecting Data**

The following computer safeguards can prevent costly computer breakdowns and the loss of crucial data.

- Position equipment away from direct sunlight or heat.
- Place equipment on well-ventilated surfaces.



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## ***Protecting Data***

- Use dust covers.
- Dust the office space regularly.
- Weather-strip doors and windows.
- Do not eat or drink near valuable equipment.
- Never place, even temporarily, food or beverages on your computer.
- Do not touch unprotected floppy disk surfaces.
- Keep disks away from heat, dirt, smoke and moisture.
- Do not place heavy objects, like books, on disks.
- Keep all magnets, including magnetic paper clip holders, telephones, fluorescent lamps and electric motors, away from floppy disks.

## ***Safety Issues***

Take frequent breaks from repetitive tasks, such as inputting data into a computer, in order to reduce the risk of injuries due to repetitive motion. For every hour you work, take a five minute "exercise" break to stretch out, walk and get the blood circulating.

The Occupational Safety & Health Administration recommends the following for reducing work related injuries:

- Minimum wrist deviation, using the "straight hand-forearm" method for typing.
- A 15 degree back tilt on chair/lumbar support and footrest.
- Video display terminal anti-glare/contrast adjustment.
- Adequate training/education in stretching exercises.

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## **Safety Issues**

While telecommuting, you should regularly check the work place to keep it in the most safe and efficient condition. The following document is provided to help in this inspection.

### **Safety Checklist**

This form is a reminder only of general areas and items to be inspected. Check for other potentially unsafe conditions as well.

Satisfactory Condition

### **Fire Protection**

- Smoke Alarm
- Fire Extinguisher
- Clear access to fire extinguisher

### **Emergency Procedures**

- Evacuation plans established
- First aid supplies adequate

### **Electrical**

- Extension cords in good condition: outlets not overloaded
- Electrical equipment and tools properly maintained
- Fuse box clearly accessible and properly labeled
- No electrical cord tripping hazards
- Surge protection for electrical equipment
- Sufficient ventilation for electrical components

### **Household**

- Heating/air conditioning in good repair
- Household appliances in safe working order
- Uncluttered work environment
  
- Name and phone number of nearest health care facility:  
\_\_\_\_\_

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**Inspector's Signature:**

**Date:**

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## **Telephone Etiquette**

### **Message-Taking**

Proper training can eliminate the two chief complaints people have about dealing with telecommuters: leaving messages and scheduling meetings.

Decide how your company will deal with incoming calls for employees who are telecommuting. Some examples of suitable ways to answer a telecommuter's office phone:

#### ■ **Example 1**

*Secretary:* "Ms. Smith's office."

*Caller:* "May I speak with Ms. Smith, please?"

*Secretary:* "Ms. Smith is away from her office. May I take your name and phone number?"

#### ■ **Example 2**

*Secretary:* "Mr. Thompson's office."

*Caller:* "May I speak with Mr. Thompson, please?"

*Secretary:* "Mr. Thompson is not available at this time. He will be checking for messages shortly. May I tell him that you called? May I take your name and phone number?"

#### ■ **Example 3**

*Secretary:* "Mrs. Carter's office."

*Caller:* "May I speak with Mrs. Carter, please?"

*Secretary:* "Mrs. Carter is unavailable to answer the phone. May I have her return your call? May I take your name and phone number?"

#### ■ **Example 4**

*Secretary:* "Mr. Johnson's office."

*Caller:* "May I speak with Mr. Johnson, please?"

*Secretary:* "Mr. Johnson is working from another office today. He may be reached at 213-555-4321."

Call forwarding, voice mail and electronic mail are also effective ways to communicate with telecommuters.



## Scheduling

Set up a master calendar to make scheduling easier and to let others in the office know who is telecommuting and how to get in touch with them. The following is an example of a master schedule:

### ■ *Telecommuting Schedule*

*Week Of:* \_\_\_\_\_

*Telecommuter:* \_\_\_\_\_

*Phone Number:* \_\_\_\_\_

*Telecommuting Days:*    M    T    W    Th    F

*Telecommuter:* \_\_\_\_\_

*Phone Number:* \_\_\_\_\_

*Telecommuting Days:*    M    T    W    Th    F

*Telecommuter:* \_\_\_\_\_

*Phone Number:* \_\_\_\_\_

*Telecommuting Days:*    M    T    W    Th    F

*Telecommuter:* \_\_\_\_\_

*Phone Number:* \_\_\_\_\_

*Telecommuting Days:*    M    T    W    Th    F



## ***Further Information***

For further information and assistance, contact Commuter Transportation Services, Inc. (CTS), 3550 Wilshire Boulevard, Suite 300, Los Angeles, CA 90010. CTS is a private, non-profit organization founded in 1974. Its mission is to improve commuter mobility by providing services and information on ridesharing programs and other alternatives to driving alone.

- Los Angeles: (213) 380-7750
- Northern Los Angeles: (805) 273-2425
- Riverside/San Bernardino Counties: (714) 422-8088
- Ventura County: (805) 656-2477





## ***CTS Offices***

### ■ ***Los Angeles***

3550 Wilshire Blvd., Suite 300  
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Business: (213) 380-7750  
Commuter Matching: (213) 380-RIDE

### ■ ***Northern Los Angeles***

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Palmdale, CA 93550  
Business: (805) 273-2425  
Commuter Matching: (805) 255-RIDE

### ■ ***Riverside and San Bernardino***

1430 E. Cooley Dr., Suite 120  
Colton, CA 92324  
Business: (714) 422-8088  
Commuter Matching: (714) 684-RIDE, (714) 825-RIDE

### ■ ***Ventura***

950 County Square Drive, Suite 101  
Ventura, CA 93003  
Business: (805) 656-2477  
Commuter Matching: (805) 656-RIDE



