

Shasta County Employee Telecommuting Program Handbook

(Addendum to the Personnel Rules)



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WHAT IS TELECOMMUTING?

Telecommuting is an arrangement that allows employees to work at a location other than the conventional office, such as an employee's home or a satellite office. Telecommuting is usually used for part of the workweek, or periodically, as occasions arise where departments are employees would benefit from such an arrangement.

Three elements are needed for successful telecommuting: 1) work that is independent in nature (e.g., writing, reading, organizing data, telephoning, data entry, and word processing); 2) employees who are productive, responsible, highly self-motivated, and skilled in their jobs; and, 3) supervisors who are willing and able to supervise without being in constant contact with employees.

Shasta County's Telecommuting Program is designed for selected employees who meet specific work standards and expectations, as described in this booklet. It is a program designed to meet the County's production needs yet still respond to the a changing expectations of a modern workforce and to reduce air quality hazards. Since this is a non-traditional approach to County work, we have developed this extensive procedures handbook. Please do not be intimidated by its length and level of detail covered. It is important for everyone interested in the program to understand how this type of work schedule is successfully accomplished. Shasta has modeled its program after one that has been operating successfully for many years in Alameda County.

HOW TO APPLY

If your department is participating in the Shasta County Telecommuting Program and you think your job and work performance are appropriate for telecommuting, you need to:

1. Read all sections of this document. Pay special attention to Participation Guidelines and the application form (*see Appendix*).
2. Read Selection Criteria (below).
3. Obtain your immediate supervisor's approval to apply.
4. Review and complete your **Application Packet**. You can use the forms in this document by making copies.
5. Complete the application and submit it to your supervisor. If approved by the supervisor, he or she will route the application though department channels to the department head. If the department head approves the application, it will be submitted to the County Administrative Officer (CAO) for consideration. Final approval is at the sole discretion of the CAO. If approved by the CAO, a copy will be returned to the Department who will then route copies to the Director of Support Services and the appropriate union. A Personnel Action Form (PAF) must accompany copy, to the Department of Support Services-Personnel Unit, designating the employee is a telecommuter. The application process is not complete until a copy of the agreement has been accepted and approved by the Department of Support Services-Personnel Unit.

6. Once the Telecommuting schedule has been approved by the CAO, the employee and supervisor will finalize the agreement, including the details of equipment ownership, security, safety, work site, work product standards, review of the telecommuting guidelines, etc.

The Department Head and the County Administrative Officer must approve all applications prior to implementation of a telecommuting schedule.

Selection Criteria

1. Applicants' job duties must be appropriate for telecommuting;
 2. Applicant must have a current job evaluation rating of at least "meets standards";
 3. Applicant must have a consistently high rate of productivity, and a high level of skill and knowledge of job;
 4. Applicant must be able to work with minimal direct supervision, and be able to obtain feedback when needed;
 5. Applicant must have good organizational and time management skills;
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6. Applicant's telecommuting work location, must be consistent with the employment goals of Shasta County;
 7. Applicant must agree to comply with all Participation Guidelines (included herein) required by the Telecommuting Program and arrange work agreements with supervisor(s); and,
 8. Applicant must be aware that participation in telecommuting can be terminated at will by department head or the employee.

GOALS AND PROGRAM GUIDELINES

GOALS: 1) to increase productivity and effective use of staff work-time; 2) to promote efficient use of resources; and, 3) to assist in reducing traffic and air quality hazards.

PROGRAM GUIDELINES: (How the Program Works)

1. Each participating department will comply with these guidelines.
2. Departments will select employees for telecommuting based on job suitability, the likelihood of success as telecommuters, and the supervisor's ability and willingness to manage telecommuting employees. All participants (supervisors and employees) must have the approval of the Department Head and the County Administrative Officer.
3. All telecommuting employees and supervisors will: 1) comply with screening and selection criteria in order to enter the program; 2) agree to follow Participation Guidelines; 3) sign telecommuting agreements;

4. Participation in the Telecommuting Program is voluntary. The department head may, at any time, cancel the telecommuting agreement, permanently or temporarily. Except in cases of an emergency, the department head shall provide an employee with fourteen (14) days advance notice of a permanent schedule change and or twelve (12) hours notice of a temporary change. The employee must provide the department head fourteen (14) days advance notice of his or her desire to return to a standard schedule at the normal work site. These timeframes can be modified by mutual agreement of the department head and employee.
5. The Department of Support Services-Personnel Unit will provide technical assistance to departments, upon request.

PARTICIPATION GUIDELINES

All participants must understand and agree to the following guidelines.

1. Telecommuting is not a substitute for child or elder care. The telecommuter must provide child or dependent care in a manner that allows job responsibilities to be successfully met.
2. The duties, obligations, responsibilities, and conditions of a County employee are not changed by telecommuting. Employee's salary, retirement, benefits, and insurance coverage remain unchanged.
3. The telecommuting employee remains obligated to comply with all County rules, policies, practices, and instructions. Violation may result in preclusion from telecommuting and/or disciplinary action, up to and including termination of employment.
4. Work hours, overtime compensation, and vacation schedule will conform to the MOU provisions, Fair Labor Standards Act (FLSA), and to any other terms agreed upon by employee and supervisor, except that, those terms may not violate the laws/provisions stated above.
5. Telecommuting usually occurs on a regular, part-time or periodic basis, which is arranged with telecommuter's supervisor. Requests to work overtime, use sick leave, vacation, or other leave must be pre-approved by the employee's supervisor in the same manner as when working in the regular office.
6. Employee will work at an approved designated location during the hours agreed upon. Employee will not work elsewhere, unless agreed upon with supervisor.
7. Employee agrees not to engage in employment activities other than County assignments during telecommuting hours. Arrangements for flexible work schedules are subject to the County's policy on alternative work schedule.
8. Expectations must be pre-established between telecommuters and supervisors regarding work assignment(s), productivity level, and productivity measurements to be used when employee is telecommuting. Please see Sample Assignment Agreement Form and Sample Telecommuter's Daily Report in the *Appendix*.

9. County-provided equipment is not an entitlement for telecommuters. Departments may provide equipment, but are not obligated to do so. Information Technology must pre approve all arrangements for the use or installation of County computer or phone equipment. Office supplies needed by the telecommuter will be provided by the department. All requests for equipment and supplies must be approved by the responsible supervisor.
10. Use of County equipment and supplies is limited to authorized persons for purposes relating to County business. The employee is responsible for ensuring that equipment is used properly. The County will provide for repairs to County equipment. Employee will cover all utility costs incurred while working at home.
11. When employee uses his/her own equipment for telecommuting, the employee is responsible for maintenance and repair of equipment. Information Technology must pre approve all arrangements for the use or installation of County software or access to other County systems. The employee will cover all utility costs incurred while working at home.
12. In the event of delay in repair or replacement of equipment or any other circumstance under which it would be impossible for the employee to telecommute, the employee will be assigned other work and/or will return to County work place.
13. Employee must designate a workspace at home that is maintained in safe condition, free from hazards. Telecommuter will be responsible for completing a home/work space safety checklist (please see *Appendix*). Any accident must be brought to the immediate attention of the supervisor.
14. With 24-hour advance notice, an appropriate representative of the County may make on-site visits to the employee's home to determine that the work site is safe and free from hazards, and to maintain, repair, inspect, or retrieve County-owned equipment.
15. Telecommuters must have a method of receiving and responding to communications (messages, mail, etc.) from other staff, supervisors, and when applicable, clients and/or the public. Communication methods will be incorporated into the written agreement between supervisor and employee.
16. Telephone charges directly related to County business, will be paid by the department. Shasta County is not responsible for the payment of utilities (heat, electricity, etc.) nor home maintenance costs.
17. The County worker's compensation liability for job-related accidents will continue to exist during the employee's telecommuting work hours.
18. Telecommuter remains liable for injuries to third persons and/or members of employee's family on employee's premises. Shasta County is not liable for damage to the employee's real property. Employees are advised to check with their insurance advisor on the availability of incidental office liability coverage. This coverage can extend the home or rental insurance policy to cover "business pursuits" at the home. The County is not responsible for any



additional premium that may be charged and is not responsible for determining coverage issues.

19. Smoking is prohibited at County worksites in compliance with State law and in order to protect the health of employees and coworkers, and to protect County equipment and work products. The same standards should be adhered to when one is telecommuting.
20. Telecommuter will take all precautions necessary to secure County information and equipment in his/her home, prevent unauthorized access to any County system or information, and will sign an equipment security agreement.
21. Telecommuter will comply with all Shasta County Electronic Assets and Information Security Guidelines (Chapter 26 of Shasta County Personnel Rules) including access procedures.
22. All telecommuters and supervisors will agree to participate in any evaluation studies conducted by the County on the program. Responses will remain anonymous unless participants authorize release of identification. While the employee's individual responses will not be published, the data may be compiled and made available to the public without identification of the participant.
23. Telecommuting employees' home addresses and telephone numbers remain confidential and are not released to clients or other members of the public.
24. Any non-compliance with these regulations can result in disciplinary action, up to and including termination.

A signed copy of these guidelines must be attached to each telecommuter's Employee-Supervisor Agreement. The Guidelines are included in the Telecommuting Agreement Packet.

SUCCESSFUL TELECOMMUTING

To be a successful telecommuter, it's necessary to work with less structure and more freedom in completing your responsibilities. Telecommuting isn't as simple as staying at home and working. It requires careful planning and discipline. Described below are basic tools for working at home and maintaining or increasing your level of productivity.

Getting Organized

Develop good work habits from the moment you begin telecommuting and you'll realize how easy it is to complete your work away from the office.

- ◆ **Pick a work location.** Identify a safe location in your home as your workspace. You don't need to devote an entire room for your office at home. Some telecommuters have successfully developed part of an existing room, a garage, an attic, and even a closet for their workstation. Locate your workstation away from distractions. Don't try working on the couch in front of the television or on the dining room table. It doesn't work! Inform family members that your workspace is "off limits".
- ◆ **Organize supplies and equipment.** Don't get caught without necessary tools to work efficiently; frequently called phone numbers are necessary tools for the telecommuter's home office.

- ◆ **Establish a routine.** Set a work schedule for the days you telecommute and stick to it. Begin and finish working at the same time on telecommuting days. This will help you establish a routine.
- ◆ **Make a to-do list for your work assignments.** Develop a list of goals and assignments for the days you telecommute. At the end of the day, go over the list and see how much you've been able to accomplish. It's beneficial to start the list a couple of days before you're telecommuting to plan for all the resources you'll need to support your activities at home. Schedule your work so you don't need assistance from others while at home. Remember you may not have access to a fax machine, a photocopy machine, or even a computer at home. Plan your work accordingly.
- ◆ **Replace the ritual of getting ready for the office with another ritual.** As a telecommuter, you'll no longer have the traditional office rituals of morning conversations, coffee, reading the newspaper, or even the long, dreadful commute that will symbolize the beginning of the workday. Establish new rituals for telecommuting days. Some telecommuters actually leave their house, go around the block, return and begin the workday. Others play specific music, or begin working after a morning exercise session or bike ride. Find a ritual that will work for you.
- ◆ **Have an end of the day ritual.** It's a good practice to have a ritual in place to mark the end of the workday. Be creative:
 - Turn off the computer and the lights.
 - Close the door to your *office*.
 - Turn on the television.
 - Walk around the block.
 - Pick up the children from school or day care.
 - Change your clothes.
 - Sit down with your feet up and relax!

Managing your work

As a telecommuter, it's necessary to manage your work efficiently. It's up to you to make sure you keep yourself well informed and continue your high level of productivity.

- ◆ **Maintain contact with the office.** Be sure to stay in touch with the office during telecommuting days. Try establishing a buddy system with a trusted colleague or a secretary in the office whom you can call at least once a day while you are telecommuting. **Frequently check for telephone messages while you're telecommuting, and return phone calls as quickly as possible.**
- ◆ **Use Voice Mail.** Decide what greeting you will leave on you voice mail and how often you will pick up and return calls. (Please see *Appendix* for Sample Messages.)
- ◆ **Establish an organized system at home.** If you don't make the time to organize your resources and materials, you'll have trails of paper and stacks of references everywhere!
- ◆ **Stick to deadlines.** While telecommuting, follow the same rules for deadlines as if you were in the office. **Materials sent through the mail or via computer should always arrive on or before the due date.**

- ◆ **Always attend departmental gatherings.** Always attend departmental gatherings and group meetings, even if it means occasionally working in the office on a telecommuting day. Don't become invisible just because you're telecommuting.
- ◆ **Be considerate of co-workers.** Help co-workers understand that you are working while away from the office and they are not expected to compensate for your absence.

Communicating with your supervisor

Clearly understood expectations between you and your boss are imperative for successful telecommuting. So is an organized reporting system. There are various accountability methods to use, depending on the nature of the work and supervisory style (see examples below). Some jobs can be easily measured by the number of tasks, reports or files completed; some are harder to quantify. Keep trying different evaluation and accountability techniques until you and your supervisor find a comfortable system.

- ◆ Use the application questionnaire to help you and your supervisor determine exactly what tasks or projects are appropriate for your telecommuting time (see *Appendix*).
- ◆ Develop a detailed "Assignment Agreement" with your supervisor. (Please see Sample Agreement Form in the *Appendix*).
- ◆ Adjust your current reporting system to include work done while telecommuting (*e.g., detail telecommuting tasks in your weekly meeting; note telecommuting work on your regular assignment log; write a section on projects completed while you were telecommuting in your quarterly report*).
- ◆ Keep a daily time schedule while telecommuting, especially at the start of your participation. This will help you and your supervisor analyze what can and cannot be accomplished while telecommuting. (Please see Sample Telecommuter's Daily Report in the *Appendix*.)
- ◆ Compare work done while telecommuting to that done in the office for both quantity and quality (*number of reports **and** depth of analysis in the reports*).
- ◆ Determine a timeline for evaluating success of telecommuting (*try it for three months; check with your boss to evaluate*).
- ◆ Schedule and keep a regular reporting or "check-in" time with your boss, especially when first starting to telecommute. Even a five-minute meeting or voice mail message on a regular schedule will help.
- ◆ Build up trust in telecommuting by informal, as well as formal, reports to your supervisor.



Family members, friends, and neighbors

To be considered a serious telecommuter, you need to project a serious picture of your time spent working at home. Train the people at home so they understand what telecommuting means.

- ◆ **The message is: you're working while at home.** It's important to advise family members and neighbors that you're working while at home and you continue to have responsibilities and tasks that need to be completed. You have the same objectives, goals, and deadlines as you do in the office.
- ◆ **Decide which interruptions are appropriate.** Develop ground rules for your family to follow regarding interruptions while you're at home telecommuting. Some telecommuters have their families determine the rules to ensure participation in the process. You'll also need to establish rules with neighbors and friends.
- ◆ **Establish guidelines for the proper usage of office supplies.** Develop an understanding with family members of how office materials will be used; such materials are not for personal use.
- ◆ **Telecommuting isn't a replacement for child or elder care.** Don't assume because you're at home working you can also take care of children or other dependents. Telecommuting can allow you more flexibility in accommodating family needs as it cuts down on commute time, but it is not a replacement for dependent care.

Developing good habits

- ◆ **Pace yourself so as not to burn out.** Make sure you're taking breaks and don't turn into a workaholic because work is always there. Remember, any time you work needs to be reported and overtime must be authorized in advance by your supervisor. Begin and end the workday in a timely manner. Don't develop bad work habits and do less work than before.
- ◆ **Watch out for bad habits** – snacking too often • sleeping late • talking on the phone too long • watching television • drinking • smoking • wearing pajamas all day • visiting with the neighbors • procrastinating. *These habits are detrimental to telecommuting. Remove all possible temptations so you can conduct business.*

The key to successful telecommuting lies in being able to manage your workspace, your job, family members, neighbors, and yourself. Remember, there are rules you follow in the office, and you'll need another set of rules for working at home. Rules will allow you to work with less formal structure and a lot more freedom. **It's your responsibility to make telecommuting work.**

THE DOS AND DON'TS OF TELECOMMUTING

DO

Have a workspace or work station at home

Take a walk around the neighborhood before you start the workday

Stick to the same schedule on telecommuting days

Take appropriate breaks during the day

Keep your work organized so you don't have traces of paper everywhere at home

Plan the work for your telecommuting day several days in advance of telecommuting

Determine how many and what sort of interruptions are acceptable

Leave a message on your voice mail saying where and how you can be reached, or when you will pick up messages and return calls

Replace bad habits *like overeating* with exercise

Call the office and keep in touch as often as possible

Stick to all deadlines

Maintain or increase your level of performance

Take telecommuting very seriously

Attend all departmental and group meetings

Keep your boss informed of the progress you're making

Have some end of workday ritual such as a walk around the block

If telecommuting is not working for you, talk to your supervisor or manager. See if you can find ways of solving the problems. If the problems persist, you may want to drop out of the program. Remember, your participation in the telecommuting program is voluntary.

THE DOS AND DON'TS OF TELECOMMUTING

DON'T

Sit in bed or on the comfortable couch in the living room to do your work

Procrastinate or develop bad work habits at home

Change your work schedule every time you telecommute

Let the radio or television distract you or impair your professional image

Work at home if you're not getting along with your spouse or children

Work at home if you have an infant, a toddler, or an elderly person who requires constant care and attention

Take work home that requires group decisions or constant input from co-workers

Visit the refrigerator too often when you're telecommuting

Sleep late on telecommuting days

Stay in your bedclothes all day

Give telecommuting a bad name

Run everyone's errands just because you're at home

Continue in the telecommuting program if it's not working for you



EQUIPMENT, SECURITY, & SAFETY

Many telecommuting assignments do not require sophisticated equipment; paper and pens are often adequate tools for a job. When technological equipment is used, the following guidelines must be followed.

Equipment



1. Each department will determine what technology is necessary for telecommuters on a case-by-case basis.
2. Departments have several options in assisting telecommuters with equipment that may include but are not limited to: a) have employees use approved removable storage devices (as per Section 26.11 of the Shasta County Personnel Rules with compatible home/office computers; b) purchase laptop computers for telecommuters to share; c) arrange for pagers, cell phones, or Mobile Data Device for employees who must be reached immediately; or d) purchase and install all equipment needed. Providing a laptop, will in most cases, facilitate the ease in which Information Technology can provide support for this function. Department's should consult with IT early in the process when considering a telecommuting schedule that requires the use of computer equipment.
3. Departments that cannot assist employees with equipment can require employees who apply for telecommuting to provide their own equipment. Department's should consult with IT early in the process when considering a telecommuting schedule that requires the employee to use their own computer equipment.
4. Software will be provided by the [County Information Technology] Department unless other arrangements are approved by the Department Head. All software copyright laws will be adhered to, and only properly registered software will be used for County work. In no instance will unauthorized copies be made of County-owned software.
5. All equipment and software owned by the County will be repaired by the County. Use of a laptop would easily allow an employee to return equipment for repair and perhaps be able to resume the telecommuting schedule more quickly than using a PC. All employee-owned equipment is the responsibility of the employee. (Please see Telecommuting Participation Guidelines.)
6. A current inventory of all County-owned hardware, software, and other equipment used by telecommuters must be kept by the Department. Release and "loan" forms must be signed by telecommuter and supervisor for all supplies and equipment used at home.
7. Ownership of all data and files will be retained by the County and the employee must adhere to the Electronic Assets Policy and other related County policies.

Security

Data and information used by telecommuters must be treated with the same caution and respect that confidential material is given in the office. In some cases, telecommuters will need to take a few added precautions.

1. **Telecommuters must obtain written permission from the Information Technology Department in order to access the County LAN or other appropriate computer system.** Telecommuters must have the approval of their Department Head before applying to Information Technology Department for access to the LAN or other appropriate system.
2. Telecommuter access to Local Area Networks (LAN's) and dial back capabilities will be determined by IT LAN administrators, in consultation with supervisors and other appropriate personnel, including the Department Head.
3. Telecommuters must establish data security procedures with family members. Access codes will not be shared with family members or any unauthorized personnel.
4. A signed Security Agreement from all telecommuters working with County data must be a part of the application packet (see *Appendix*).



Safety

As part of your telecommuting responsibilities, you must ensure that safety and ergonomic standards are met in your home office. Although the workspace does not have to be a separate room, it must have adequate lighting, ventilation, and furniture that is comfortable and safe to use. Posted emergency phone numbers and first aid kit are also important items for your home office.

If injured while working at home, policies and proceeds apply the same as if you were injured while working in the office. Report the injury immediately to your supervisor. Medical treatment should be obtained at Redding Occupational Medical Center (ROMC) unless you have pre-designated a personal physician for such treatment.

Each Shasta County employee accepted into the Telecommuting Program must complete and submit a Safety Checklist before beginning to telecommute. Supervisors of telecommuters have the right to inspect home workspace.

Please see Telecommuting Safety Checklist and suggestions on developing first aid kit in the *Appendix*.

SUPERVISING

Managing telecommuters demands the same skills that are required for good supervision of any employee... communication, organization, and trust between employee and supervisor.

Organization

- ◆ **Assist telecommuters organize their work.** Understand the timeframes involved in completing tasks, and the resources required to see projects through to completion.
- ◆ **Communicate work expectations.** Establish a means of communicating the expected end product as well as the due date, the anticipated quality, and other criteria that must be met to successfully complete the job or the project.

Communication may take the form of phone calls, a weekly face-to-face meeting, or written memos. Use whatever means of communication is most comfortable for you. The time you spend communicating with telecommuting employees will affect the caliber of work they produce. (Please see Sample Assignment Agreement Form in the *Appendix*).



- ◆ **Establish timeframes.** Work with your employees to develop an attainable timeline. Employees will find it easier to focus if they are following a timeline.
- ◆ **Review status.** Establish intermediate periods to determine progress. “Check-in” with employees at particular points during a project, upon completion of certain tasks, or on a recurring basis, such as once a week on Monday.
- ◆ **Promote Professional development.** Always reinforce positive behavior. Bring unsatisfactory performance to the employee’s attention immediately, and develop capabilities in your employees to correct deficiencies. Provide employees with timely and ongoing feedback through voice mail, electronic mail, phone calls, or face-to-face visits.

“Managing By Objectives” (MBO)

Managing by objectives or “outcomes” is a way to clearly communicate work expectations. You may find this tool so successful that you will use it for all of your employees, not just telecommuters.

A few steps to follow in MBO:

- ◆ Prepare an itemized list of expectations that describes the work objectives on a weekly, monthly, or quarterly basis. Expectations should be specific and clear (e.g., produce a report on the impact of wind velocity on commute patterns; preliminary draft due in two weeks; complete report in one month).

- ◆ Expectations can detail tasks (research to be conducted each week for the report; number of pages to be written each day) or simply describe the end product expected. Level of specificity depends on the working relationship between supervisor and employee, and the complexity and size of the work project.
- ◆ Telecommuter and supervisor should establish the objectives and timeline together and agree on criteria that must be met to **satisfactorily** complete the job.
- ◆ Track the results through meetings and written records. If you have weekly objectives, meet every week to review the telecommuter's accomplishments and make any necessary adjustments to the timeline, assignment, or objectives. Use a matrix, a graph, or a simple check-off list to record progress. The Sample Assignment Agreement Form in the *Appendix* is one example of a MBO recording tool.
- ◆ Both supervisor and telecommuter should keep copies of the objectives and timelines as well as any adjustments made to the expectations.

ACCOUNTABILITY AND EVALUATION

The question most often asked is:

“What accountability and evaluation tools do you use when telecommuting?” Or, “How can you prove employees are working at home?”

The answer is:

“I use the same measurement and evaluation tools as I use for work done in the office.”

By clarifying expectations, detailing tasks and timelines, and consistently checking on progress, you will automatically develop ways to account for work accomplished.

Follow the basic rules of good supervision in order to ensure a method of accountability most comfortable for you and your telecommuting employee. Accountability tools can include an array of tools from computer-monitored time to “check-in” meetings. Quality of work as well as quantity of work needs to be considered when evaluating a telecommuter's output. (Please see the Sample Assignment Agreement and Telecommuter's Daily Report in the *Appendix*.)

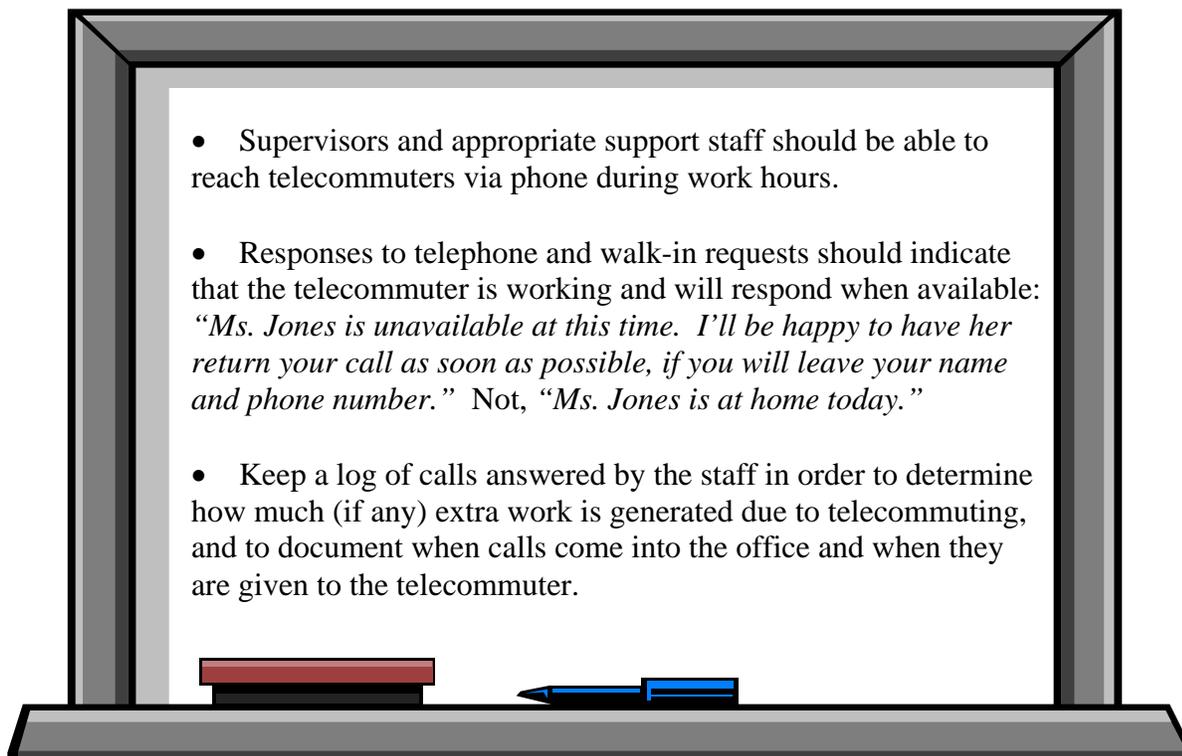
Managing Non-telecommuters

- ◆ As you identify the participants in the telecommuting program, it's necessary to work carefully with the non-telecommuters to avoid feelings of resentment regarding "why was the person chosen instead of me?" Prepare in advance the necessary documentation you'll need to support the decision of why an employee was chosen to participate. (Please see Participation Criteria section and in the *Appendix*.)
- ◆ Develop a team approach. Non-telecommuters are as critical to the program's effectiveness as the telecommuters. Your understanding of how each employee contributes to the team will support the development of a working team.
- ◆ Non-telecommuters must understand that the office social network will change with the advent of telecommuting. Their best buddy with whom they share coffee breaks and lunch hours may no longer be available to spend that time.

Establish strategies to support the non-telecommuters as well as the telecommuters. Non-telecommuters shouldn't be expected to do extra work in the office while the telecommuters are working from their homes.

Develop contingency plans. Establish Murphy's Law strategies to guide the work through every "what if" situation which may exist. Address all issues pertinent to the team as a whole. Encourage the telecommuters and non-telecommuters to jointly participate in this exercise.

Most of your telecommuting employees will have access to voice mail, which relieves co-workers of telephone reception duties for telecommuting staff. However, procedures should be established for situations that require office staff assistance, including emergency or urgent messages.



What happens if it's NOT working?



Not everyone who tries telecommuting is successful. While the application process attempts to identify successful telecommuters, there is no guarantee that the selected telecommuters will be happy or successful telecommuting. Some reasons why the telecommuter may need to terminate participation in the program are:

- ◆ **Uncontrollable distractions.** The neighbors and the family just don't understand that when the employee is at home she/he is unavailable for other activities.
- ◆ **Cabin Fever.** Being at home 24 hours a day, even occasionally, becomes unacceptable.
- ◆ **Productivity and/or quality of work.** The employee's productivity and/or the quality of work declines while telecommuting.
- ◆ **Desire or need to be around people.** The employee discovers that the need for social interaction is a critical factor in work.

If it becomes apparent that the employee must stop telecommuting, help the employee understand that she/he is of value to the organization, and that telecommuting is not for everyone.

THE DOS AND DON'TS OF SUPERVISING TELECOMMUTERS

DO:

Trust your telecommuter(s)

Encourage good organizational skills

Continue developing skills in telecommuter(s)

Encourage goal setting

Give appropriate and timely feedback

Take the time to plan

Manage by measuring results

Communicate regularly

Use telecommuting as an opportunity to strengthen your management skills

Be flexible; use your creativity to achieve optimum results from the program

Expect the program to evolve and change

Take telecommuting very seriously

Delegate assignments equitably among telecommuters and your non-telecommuting employees

Schedule regular status reports

Be prepared, if telecommuting does work well, to allow the employee greater frequency of telecommuting

DON'T:

Conduct time checks

Call your telecommuter(s) every hour to check on progress

Ask for constant status reports

Neglect problems

Ignore your telecommuter

Set unattainable goals

Manage by over-supervising

Expect perfection; there will be adjustments

Give telecommuting a bad name

Expect everyone to be a successful telecommuter

Insist that an unsuccessful telecommuter remain in the program

**SHASTA COUNTY TELECOMMUTING PROGRAM
APPLICATION PACKET: FORMS AND AGREEMENTS**

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SHASTA COUNTY TELECOMMUTING PROGRAM

EMPLOYEE APPLICATION FORM

Complete the application and submit it to your supervisor. If approved by the supervisor, he or she will route the application through department channels to the department head. If the department head approves the application, it will be submitted to the County Administrative Officer (CAO) for consideration. Final approval is at the sole discretion of the CAO. If approved by the CAO, a copy will be returned to the Department and copies will be routed to the Director of Support Services and the appropriate union. Once the Telecommuting schedule has been approved by the CAO, the employee and supervisor will finalize the agreement, including the details of equipment ownership, security, safety, work site, work product standards, etc. **THE DEPARTMENT HEAD AND THE COUNTY ADMINISTRATIVE OFFICER MUST APPROVE ALL APPLICATIONS PRIOR TO IMPLEMENTATION OF A TELECOMMUTING SCHEDULE.** Telecommuting work cannot begin until a copy of the agreement has been accepted and approved by the Department of Support Services-Personnel Unit. The Department is responsible for ensuring copy is provided to Department of Support Services-Personnel Unit.

Immediate Supervisor must complete all sections indicated and submit form to next level of authority.

Applicant's Name _____ Supervisor _____

Classification _____ Department _____

Telephone _____

SECTION I

Rate the following characteristics of applicant's position; i.e., what the employee does in her/his job, not how well it is done (High, Medium, Low):

	Rating by Applicant			Rating by Supervisor		
	H	M	L	H	M	L
Amount of face-to-face interaction required daily	<input type="checkbox"/>					
Possibility of employee's meetings to be organized into scheduled time periods	<input type="checkbox"/>					
Telephone interaction required	<input type="checkbox"/>					
Computer interaction required (E-Mail)	<input type="checkbox"/>					
Level of quantitative accountability methods (written or narrative reports on a regular basis, etc.)	<input type="checkbox"/>					
Number of consistent, clear objectives established	<input type="checkbox"/>					
Employee's ability to control and schedule work flow	<input type="checkbox"/>					
Amount of in-office references material required for employees work	<input type="checkbox"/>					
Required level of security for data or other information	<input type="checkbox"/>					

SECTION II

Rate the work style on each of the characteristics listed (High, Medium, Low):

	Rating by Applicant			Rating by Supervisor		
	H	M	L	H	M	L
Rate of productivity	<input type="checkbox"/>					
Level of quality of work	<input type="checkbox"/>					
Ability to work with minimal supervision	<input type="checkbox"/>					
Need for colleagues/supervisor input	<input type="checkbox"/>					
Conscientiousness about work time	<input type="checkbox"/>					
Level of organizational skills	<input type="checkbox"/>					
Level of computer literacy (if needed for job)	<input type="checkbox"/>					
Level of job experience	<input type="checkbox"/>					
Ability to ask for assistance when needed	<input type="checkbox"/>					

SECTION III

Applicant must complete the next four (4) questions.

Supervisor must indicate approval of each applicant statement or recommend modifications.

1. Describe in four lines or less, the work you will usually conduct at home on telecommuting days:

Applicant:

Supervisor Comments: (Approval or recommendation for change)

2. Describe how you will report and account for the work done when telecommuting (be specific):

Applicant:

Supervisor Comments: (Approval or recommendation for change)

3. Describe your preferred telecommuting schedule:

Applicant:

Supervisor Comments: (Approval or recommendation for change)

4. Describe equipment you need in order to telecommute and whether or not you already own it.

Applicant:

Supervisor Comments: (Approval or recommendation for change)

5. Provide location address of where telecommuting work will take place.

Applicant:

Supervisor Comments: (Approval or recommendation for change)

I have read and will comply with all telecommuting guidelines and agreements if approved for telecommuting.

Applicant's Signature _____ Date _____

Supervisor's Approval or recommendations: _____

Supervisor's Signature _____ Date _____

SHASTA COUNTY TELECOMMUTING PROGRAM

TELECOMMUTING PROGRAM APPROVAL/SIGNATURE FORM

(Must be accompanied by the completed Employee Application form)

Applicant Name _____ Date Submitted to Immediate Supervisor _____

Department Name _____

Classification/Position _____

Immediate Supervisor

___ Approval of application as requested by employee.

___ Approval of application with the following modifications noted below (see comments).

___ Denial of application for telecommuting (see comments).

Comments: _____

Signature: _____ Date: _____

Department Head

___ Approval of application as requested by employee.

___ Approval of application with the following modifications noted below (see comments).

___ Denial of application for telecommuting (see comments).

Comments: _____

Signature: _____ Date: _____

County Administrative Officer

___ Approval of application as requested by employee.

___ Approval of application with the following modifications noted below (see comments).

___ Denial of application for telecommuting (see comments).

Comments: _____

Signature: _____ Date: _____

Information Technology (Director or Deputy Director of IT As Applicable)

___ Approval of **access the County LAN or other appropriate computer system**

Comments: _____

Signature: _____ Date: _____

Submitted to Department of Support Services-Personnel Unit by:

Printed Name: _____ Date: _____

SHASTA COUNTY TELECOMMUTING PROGRAM

EMPLOYEE-SUPERVISOR AGREEMENT FORM

This agreement specifies the telecommuting arrangement and is signed when employee has been approved by the Department Head and County Administrative Officer for the Telecommuting Program.

1. Employee agrees to comply with all Shasta County Telecommuting Procedures, County Policies and Department Policies.

2. Employee will telecommute on the following schedule:

3. Work assignments on telecommuting days will be reported and accounted for in the following way:

4. The following equipment will be used by employee for telecommuting:

_____ provided by _____
_____ provided by _____
_____ provided by _____

5. Employee agrees to call department office to obtain his/her messages or Voice Mail at least _____ times per telecommuting day.

6. Business-related telephone expenses incurred during telecommuting hours will be covered in the following manner (separate phone line, etc; please be specific):

7. Telecommuter shall maintain a functional phone and _____ (FAX, voice mail, answering machine, etc.) in order to receive messages and bulletins.

List meetings/events that must be attended by telecommuter at regular work site.

Access Requirements

- 8. County information technology to which telecommuter will have access from remote work location (if any):

<u>SYSTEM</u>	<u>APPLICATION</u>	<u>DATABASE</u>
_____	_____	_____
_____	_____	_____

- 6. Employee agrees to obtain from department all supplies needed for work during telecommuting hours. Out of pocket expenses for supplies available from County will not be reimbursed.
- 7. Employee and supervisor are aware that telecommuting is voluntary and may be terminated as provided for in the policy.
- 8. Approval for telecommuting for this employee has been received from the Supervisor, Department Head, and County Administrative Officer and Information Technology as applicable.

I have reviewed the above material with _____ prior to his/her participation in the County's Telecommuting Program.

DATE SUPERVISOR

I have reviewed the above material and discussed it with my supervisor. I agree to comply with all regulations of the Telecommuting Program and other related County policies, including those stipulated in this agreement.

DATE EMPLOYEE

This agreement must be accompanied by:

- 1) approved employee application;
- 2) signed assignment agreement;
- 3) signed security agreement;
- 4) signed participation guidelines; and
- 5) telecommuter safety form.

Copies of signed agreement forms must be retained by the employee, the supervisor, and in the department personnel file. Copies must be sent to Department of Support Services-Personnel Unit and to the appropriate union.

SHASTA COUNTY TELECOMMUTING PROGRAM

SECURITY AGREEMENT FORM

When working at home, it is the responsibility of the telecommuter to protect County assets, information, and information technology at the home location.

1. Confidential papers and equipment will be kept in a secure area with controlled access.
2. Computer equipment belonging to the telecommuter that contains County information will be protected by passwords or other access control methods developed by the Department.
3. Documents containing sensitive information will be returned to a County work location for proper disposal and not thrown into the household trash.
4. Transportation of documents or materials to and from the telecommuter's home location will be in a safe, secure and confidential manner. Files, materials, and equipment will not be left unattended in vehicles and will be kept in a secure area in the home. Family members will not have access to confidential records.
5. Request for access to Local Area Networks and other departmental systems will be in writing and subject to approval by IT. The telecommuter will not access data by any unauthorized means.
6. Adequate use of virus protection or prevention techniques will be used to insure that viruses are not transmitted to the County's system and that County data is not lost due to virus infection.
7. Other: _____

I agree to follow the above security procedures and all technical guidelines when telecommuting.

Supervisor's Signature

Date

Employee

Date

SHASTA COUNTY TELECOMMUTING PROGRAM

TELECOMMUTING SAFETY CHECKLIST FORM

The following checklist should be used by each telecommuter in organizing a home workspace. The checklist must be completed prior to the start of telecommuting and submitted to telecommuter's supervisor for review. Inspection of the workspace by a department representative or the employee's supervisor is permissible with 24-hour notice to the telecommuter.

Work Space

- Telecommuter has a separate, clearly defined work space that is kept clean and orderly, and is not used for other purposes.
- The work area is adequately illuminated with lighting directed toward the side or behind the line of vision, not in front or above it.
- Exits and pathways are free of obstructions.
- Supplies and equipment (both departmental and employee-owned) are in good condition.
- The work area is well ventilated and heated.
- Storage is organized to minimize risks of fire and spontaneous combustion.
- All extension cords have a grounding conductor.
- Exposed or frayed wiring and cords are repaired or replaced immediately upon detection.
- Electrical enclosures (switches, outlets, receptacles, junction boxes) have tight fitting covers or plates.
- Surge protectors are used for computers, fax machine, and printers.
- Heavy items are securely placed on sturdy stands close to walls.
- Computer components are kept out of direct sunlight and away from heaters.

Emergency Preparedness

- Emergency phone numbers (nearest hospital, fire department, police department) are posted at home work site.
- A first aid kit is easily accessible and periodically inspected and replenished as needed.
- There is an accessible, portable fire extinguisher that is rated for A, B, and C (paper, liquid, and electrical) fires.
- Fire extinguishers are serviced on an annual basis.

Ergonomics

Desk, chair, PC, and other equipment are of appropriate design and arranged so that:

- Neck and shoulders are not stooped to view the task.
- There are no pressure points on any part of the body (wrists, forearms, back of legs).
- There is no glare on the terminal screen.
- Work can be performed without eyestrain.
- There is no strain on any part of the body.

Comments: _____

Date of inspection by telecommuter: _____

Telecommuter's Signature: _____

I have reviewed the checklist and discussed any problems with telecommuter:

Supervisor's Signature: _____ Date: _____

SHASTA COUNTY TELECOMMUTING PROGRAM

SAMPLE TELECOMMUTING ASSIGNMENT AGREEMENT FORM

This sample Assignment Agreement is an example of an accountability record for telecommuting. Employee and supervisor can develop their own methods and instruments of measuring and evaluating work while telecommuting. See "Communicating with Your Supervisor" in the section entitled Successful Telecommuting.

I. Project/Task/Assignment that will be worked on while telecommuting: (please be as detailed as possible – e.g., entry of 40 pages of data each telecommuting day; new handbook for employee benefits).

II. Dates which project/tasks/assignment will be worked on:

III. Completion date for project/tasks/assignment:

IV. Product (or evidence) of work to be presented upon completion:

_____ Date

_____ Supervisor's Signature

_____ Date

_____ Employee's Signature

Please check one:

- This is part of regularly scheduled telecommuting.
- This is a periodic telecommuting schedule.

See Reverse Side for Assignment Review

SHASTA COUNTY TELECOMMUTING PILOT PROGRAM

SAMPLE TELECOMMUTING ASSIGNMENT AGREEMENT REVIEW FORM

Assignment described on reverse side has been (check one):

- Completed satisfactorily by due date.

- Partially completed by due date. State reasons for delay and date by which it will be completed.

Attach a new Assignment Agreement for the continued work.

Date

Supervisor's Signature

Date

Employee's Signature

SHASTA COUNTY TELECOMMUTING PROGRAM

TELECOMMUTER MESSAGES FOR VOICE MAIL

Your greeting should assure the caller that even though you are working out of the office, you will receive messages and return calls as promptly as possible. Remember to change your greeting daily or more often if needed. Re-record your greeting until you are satisfied with it. It is a good idea to ask County callers to leave their outside phone numbers.

Hello, this is Mary Smith. On Friday, October 1, I will be away from the office, but will receive your message, and I will return your call as soon as possible. Please leave your outside phone number if you're calling from a County phone. If you have an urgent message or need to speak to someone right away, press "0" and someone will help you.

Hello, this is Mary Smith. On Friday, October 1, I will retrieve my messages every two (one?) hours between 8 a.m. and 5 p.m., and I will return your call today. Please leave a confidential message. If you need to speak to someone right away, please press "0" and my secretary will help you. If you are calling from a County phone, please leave your outside phone number.

Hello, this is Mary Smith. On Friday October 1, I will be working in the field and will check my messages every hour. Please leave a complete message with your phone number, and I will return your call as soon as possible. You may also press "0" and someone will help you or take a message for me.

Hello, this is Mary Smith. On Friday October 1, you can reach me at (your phone number) or leave a message on my voice mail, and I will return you call as soon as possible. Press "0" if this is an urgent call. If you are calling from a County phone, please leave your outside number. [Note: This type of message should be used only if you want your home phone number on your voice mail.]

If you carry a County pager, voice mail can be set up to page you automatically whenever you have an urgent voice mail message.

If you do not have voice mail, you need to make arrangements with office staff to screen your calls and call you at home with messages – or refer callers to your home phone.

PARTICIPATION GUIDELINES

All participants must understand and agree to the following guidelines.
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1. Telecommuting is not a substitute for child or elder care. The telecommuter must provide child or dependent care in a manner that allows job responsibilities to be successfully met.
2. The duties, obligations, responsibilities, and conditions of a County employee are not changed by telecommuting. Employee's salary, retirement, benefits, and insurance coverage remain unchanged.
3. The telecommuting employee remains obligated to comply with all County rules, policies, practices, and instructions. Violation may result in preclusion from telecommuting and/or disciplinary action, up to and including termination of employment.
4. Work hours, overtime compensation, and vacation schedule will conform to the MOU provisions, Fair Labor Standards Act (FLSA), and to any other terms agreed upon by employee and supervisor, except that, those terms may not violate the laws/provisions stated above.
5. Telecommuting usually occurs on a regular, part-time or periodic basis, which is arranged with telecommuter's supervisor. Requests to work overtime, use sick leave, vacation, or other leave must be pre-approved by the employee's supervisor in the same manner as when working in the regular office.
6. Employee will work at a designated location during the hours agreed upon. Employee will not work elsewhere, unless agreed upon with supervisor.
7. Employee agrees not to engage in employment activities other than County assignments during telecommuting hours. Arrangements for flexible work schedules are subject to the County's policy on alternative work schedule.
8. Expectations must be pre-established between telecommuters and supervisors regarding work assignment(s), productivity level, and productivity measurements to be used when employee is telecommuting.
9. County-provided equipment is not an entitlement for telecommuters. Departments may provide equipment, but are not obligated to do so. Information Technology must pre approve all arrangements for the use or installation of County computer or phone equipment. Office supplies needed by the telecommuter will be provided by the department. All requests for equipment and supplies must be approved by the responsible supervisor.
10. Use of County equipment and supplies is limited to authorized persons for purposes relating to County business. The employee is responsible for ensuring that equipment is used properly. The County will provide for repairs to County equipment. Employee will cover all utility costs incurred while working at home.
11. When employee uses his/her own equipment for telecommuting, the employee is responsible for maintenance and repair of equipment. Information Technology must pre approve all arrangements for the use or installation of County software or access to other County systems. The employee will cover all utility costs incurred while working at home.
12. In the event of delay in repair or replacement of equipment or any other circumstance under which it would be impossible for the employee to telecommute, the employee will be assigned other work and/or will return to County work place.
13. Employee must designate a workspace at home that is maintained in safe condition, free from hazards. Telecommuter will be responsible for completing a home/work space safety checklist. Any accident must be brought to the immediate attention of the supervisor.
14. With 24-hour advance notice, an appropriate representative of the County may make on-site visits to the employee's home to determine that the work site is safe and free from hazards, and to maintain, repair, inspect, or retrieve County-owned equipment.
15. Telecommuters must have a method of receiving and responding to communications (messages, mail, etc.) from other staff, supervisors, and when applicable, clients and/or the public. Communication methods will be incorporated into the written agreement between supervisor and employee.
16. Telephone charges directly related to County business will be paid by the department. Shasta County is not responsible for the payment of utilities (heat, electricity, etc.) nor home maintenance costs.

17. The County worker's compensation liability for job-related accidents will continue to exist during the employee's telecommuting work hours.
18. Telecommuter remains liable for injuries to third persons and/or members of employee's family on employee's premises. Shasta County is not liable for damage to the employee's real property. Employees are advised to check with their insurance advisor on the availability of incidental office liability coverage. This coverage can extend the home or rental insurance policy to cover "business pursuits" at the home. The County is not responsible for any additional premium that may be charged and is not responsible for determining coverage issues.
19. Smoking is prohibited at County worksites in compliance with State law and in order to protect the health of employees and coworkers, and to protect County equipment and work products. The same standards should be adhered to when one is telecommuting.
20. Telecommuter will take all precautions necessary to secure County information and equipment in his/her home, prevent unauthorized access to any County system or information, and will sign an equipment security agreement.
21. Telecommuter will comply with all Telecommuting Equipment and Security Guidelines including access procedures.
22. All telecommuters and supervisors will agree to participate in any evaluation studies conducted by the County on the program. Responses will remain anonymous unless participants authorize release of identification. While the employee's individual responses will not be published, the data may be compiled and made available to the public without identification of the participant.
23. Telecommuting employees' home addresses and telephone numbers remain confidential and are not released to clients or other members of the public.
24. Any non-compliance with these regulations can result in disciplinary action, up to and including termination

A signed copy of these guidelines must be attached to each telecommuter's Employee-Supervisor Agreement.

Employee	Date	Supervisor	Date
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