AGENDA
City/County Manager’s Technical Advisory Committee
Thursday, June 4, 2020
10:00 AM
MEETING ACCESSIBLE VIA ZOOM AT: https://gosbcta.zoom.us/j/91025752619

Teleconference
Dial: 1-669-900-6833
Meeting ID: 910 2575 2619

This meeting is being conducted in accordance with Governor Newsom’s Executive Orders N-25-20, N-29-20 and N-35-20.

Call to Order
Attendance

Council of Governments
1. Inland Empire Telework Initiative - Steve Smith, SBCTA

Receive information on an initiative to develop and implement a comprehensive telework program that assists San Bernardino County employers and residents in establishing convenient and effective work-at-home or remote work arrangements that are beneficial for business, communities, and the San Bernardino County transportation system, with outreach activities beginning July 1, 2020, in partnership with the Riverside County Transportation Commission (RCTC) through the IE Commuter Rideshare Program. Also included are options for establishing a mitigation crediting system that would allow for quantification of the trip-reduction and greenhouse gas (GHG) reduction benefits of telework and other transportation demand management options and the voluntary application of those credits to facilitate environmental mitigation of projects in San Bernardino County.

Attachment No. 1: Pg. 4

Public Comment
Brief comments from the General Public

ADJOURNMENT
The next meeting of the City/County Manager’s Technical Advisory Committee is August 6, 2020. The committee will go dark in July.
Meeting Procedures and Rules of Conduct
During COVID-19 ‘Stay in Place’ Orders

Meeting Procedures - The Ralph M. Brown Act is the state law which guarantees the public’s right to participate in meetings of local legislative bodies. These rules have been adopted by the Board of Directors in accordance with the Brown Act, Government Code 54950 et seq., and shall apply at all meetings of the Board of Directors and Policy Committees. California Governor Gavin Newsom has issued several Executive Orders (N-25-20, N-29-20 and N-35-20) waiving portions of the Brown Act requirements during the COVID-19 State of Emergency.

Accessibility – During the COVID-19 crisis, meetings are being held virtually using web-based or telephone technologies. If accessibility assistance is needed in order to participate in the public meeting, requests should be made through the Clerk of the Board at least three (3) business days prior to the Board meeting. The Clerk can be reached by phone at (909) 884-8276 or via email at clerkoftheboard@gosbcta.com.

Agendas – All agendas are posted at www.gosbcta.com/board/meetings-agendas/ at least 72 hours in advance of the meeting. Staff reports related to agenda items may be reviewed online at that web address.

Agenda Actions – Items listed on both the “Consent Calendar” and “Discussion” contain recommended actions. The Board of Directors will generally consider items in the order listed on the agenda. However, items may be considered in any order. New agenda items can be added and action taken by two-thirds vote of the Board of Directors or unanimous vote of members present as provided in the Ralph M. Brown Act Government Code Sec. 54954.2(b).

Closed Session Agenda Items – Consideration of closed session items excludes members of the public. These items include issues related to personnel, pending litigation, labor negotiations and real estate negotiations. Prior to each closed session, the Chair will announce the subject matter of the closed session. If action is taken in closed session, the Chair may report the action to the public at the conclusion of the closed session.

Public Testimony on an Item – Public Comment may be submitted in writing to the Clerk of the Board via email at clerkoftheboard@gosbcta.com. Written comments must acknowledge the Agenda Item number, and specify whether the commenter wishes the comment be included with the minutes or read into the record. Comments read into the record will be read for three minutes; if three minutes pass and there is comment still unread, the time will not be extended and the remaining comment will not be read. Public Comment must be submitted no later than 5:00 pm the day before the meeting. Members of the public are afforded an opportunity to speak on any listed item. Individuals wishing to address the Board of Directors or Policy Committee Members should indicate their request when Public Comment is called for during the meeting. This request to speak can be achieved by either using the ‘Raise Hand’ feature in Zoom platform or by verbally stating interest when the Chair calls for Public Comment. When recognized by the Chair, speakers should be prepared to announce their name for the record. In the interest of facilitating the business of the Board, speakers are limited to three (3) minutes on each item. Additionally, a twelve (12) minute limitation is established for the total amount of time any one individual may address the Board at any one meeting. The Chair or a majority of the Board may establish a different time limit as appropriate, and parties to agenda items shall not be subject to the time limitations. Members of the public requesting information be distributed to the Board of Directors must provide such information electronically to the Clerk of the Board via email at clerkoftheboard@gosbcta.com no later than 5:00 pm the day before the meeting. The Consent Calendar is considered a single item, thus the three (3) minute rule applies. Consent Calendar items can be pulled at Board member request and will be brought up individually at the specified time in the agenda allowing further public comment on those items.
**Agenda Times** – The Board is concerned that discussion take place in a timely and efficient manner. Agendas may be prepared with estimated times for categorical areas and certain topics to be discussed. These times may vary according to the length of presentation and amount of resulting discussion on agenda items.

**Public Comment** – At the end of the agenda, an opportunity is also provided for members of the public to speak on any subject within the Board’s authority. Matters raised under “Public Comment” may not be acted upon at that meeting. “Public Testimony on an Item” still applies.

**Disruptive or Prohibited Conduct** – If any meeting of the Board is willfully disrupted by a person or by a group of persons so as to render the orderly conduct of the meeting impossible, the Chair may recess the meeting or order the person, group or groups of person willfully disrupting the meeting to be removed from the virtual meeting. Disruptive or prohibited conduct includes without limitation: addressing the Board without first being recognized, not addressing the subject before the Board, repetitiously addressing the same subject, posting profane or rude content in the virtual meeting environment, or otherwise preventing the Board from conducting its meeting in an orderly manner. Your cooperation is appreciated!
AGENDA ITEM:

Date: June 10, 2020

Subject:
Inland Empire Telework Initiative

Recommendation:
That the General Policy Committee recommend the Board, acting as the San Bernardino County Transportation Authority:

A. Authorize staff to develop and implement a comprehensive telework program that assists San Bernardino County employers and residents in San Bernardino County in establishing convenient and effective work-at-home or remote work arrangements that are beneficial for business, communities, and the San Bernardino County transportation system, with outreach activities beginning July 1, 2020, in partnership with the Riverside County Transportation Commission (RCTC) through the Inland Empire Commuter Rideshare Program.

B. Authorize staff to work with RCTC, our local government partners, and the private sector to identify and encourage additional options for virtual travel and other cost-effective transportation demand management (TDM) strategies.

C. Authorize staff to develop options for establishing a mitigation crediting system that would allow for quantification of the trip-reduction and greenhouse gas (GHG) reduction benefits of telework and other TDM options and the voluntary application of those credits to facilitate environmental mitigation of projects in San Bernardino County, with specific proposals to be brought back to the San Bernardino County Transportation Authority Board of Directors in Fall 2020.

Background:
The Coronavirus pandemic has changed life as we know it in many ways and is creating health and economic hardships worldwide. How much of this change will become permanent is impossible to know at this time. But what has become apparent is how important the private sector’s technology tools have become to allowing society to quickly adapt to new ways of doing things.

San Bernardino County Transportation Authority (SBCTA) has partnerships with our sister agencies in Southern California (Los Angeles County Metropolitan Transportation Authority, Orange County Transportation Authority, Ventura County Transportation Commission, and Riverside County Transportation Commission) to encourage and assist employers and educational institutions in helping their employees and students to get from homes to their workplaces or schools through a variety of modes: transit, carpooling, vanpooling, walking, and cycling. In the Inland Empire, the public face of these programs is known as Inland Empire (IE) Commuter (www.IECommuter.org).

Along with our partners, SBCTA staff has been following trends in work-at-home and has been reporting those trends in studies such as the Customer-Based Ridesharing and Transit Connectivity Study (2018). The percentage of work-at-home (the term “telework” will be used going forward) for San Bernardino County residents was over 5 percent when that study was published. According to the U.S. Census’ American Community Survey, work-at-home has
grown by a staggering 173 percent since 2005. That said, many jobs are not amenable to telework, and other employers are also understandably concerned about management and productivity of remotely working staff. Data compiled by IE Commuter indicate the following levels of Telework with Inland Empire employers:

- Of the 320 IE Commuter employer clients (have a signed employer partnership agreement) in the Inland Empire, less than 7% indicated that telework was offered as an option for their employees. Also, among 92,422 employees surveyed by IE Commuter across 154 worksites in Fiscal Year 2018-2019, only 1,100 (1.2%) had teleworked at least one day during the survey week for their worksite.

**New Telework Initiative**

Recent outreach to Inland Empire employers by the IE Commuter consultant has indicated substantial additional employer interest in telework programs, given how adaptable the technologies for enabling telework have become, and in light of stay-at-home orders, how necessary they have become. Although it is unfortunate that this new knowledge and experience had to come through a pandemic, it has helped many employers and schools see the potential benefits and remaining challenges more clearly as society slowly returns to work.

SBCTA has been in discussions with Riverside County Transportation Commission (RCTC), Western Riverside Council of Governments (WRCOG), and Los Angeles County Metropolitan Transportation Authority (LACMTA) regarding responses to the dramatically increased interest in telework options as a result of the stay-at-home requirements in California. IE Commuter has not had a formal telework assistance program. Yet it is clear from the employer outreach that interest has significantly increased, due in part to seeing how effective the technologies can be to keep employees connected and productive. It has also been demonstrated that weak links in the system show up when implemented at the massive scale we have just experienced.

IE Commuter and similar programs are in an excellent position to assist employers with organizing and growing effective telework programs. With appropriate programs in place, there could be a moderate to significant longer term shift toward telework and other forms of virtual travel. These could have ancillary benefits through highly cost-effective reductions in vehicle miles traveled (VMT) and greenhouse gases (GHGs), given that no major new public infrastructure is needed. In fact, it could reduce the pressures on the infrastructure we already have. Successful longer term implementation will depend, in part, on initiatives that are taken by transportation agencies like SBCTA and RCTC to assist employers in establishing and maintaining these programs, and helping individual residents of the Inland Empire to take advantage of these opportunities as well.

SBCTA and RCTC are working with our IE Commuter consultant through the months of May and June to structure a new employer Telework Assistance Program that can be implemented in early July 2020. Attachment 1 represents a partial draft of a proposed Telework Guidebook for employers that will be one of the tools IE Commuter can employ for outreach and assistance. In addition to providing an overview of the process for incorporating telework as an employee option, the Guidebook will provide sample telework guidelines, a sample employee telework agreement, and guidelines for supervisors. Large employers may fully utilize these materials; smaller ones could use scaled-back versions. The materials will all be web-based and

San Bernardino County Transportation Authority
downloadable at no cost and will also be useful for county residents wanting to explore options for their employment sites within and outside San Bernardino County.

The intent is to finalize these components and put them in place by the date of SBCTA Board approval on July 1, 2020. The IE Commuter consultant will immediately be in a position to offer employers telework assistance with both the additional tools and program structure in place. Additional travel demand management (TDM) strategies can then be added over time, or increased in emphasis.

A telework program could also have additional economic benefits for the Inland Empire. For many years, there has been a hope that the IE would have less of an imbalance between jobs and housing. Although there are many employment opportunities in the IE itself, the predominant flow of workers in the morning is from the IE to Los Angeles (LA) and Orange counties in the morning, and back to the IE in the evening. This has led to legendary congestion levels throughout Southern California, including the State Route (SR) 91, SR 60, Interstate (I) 10, and I 210 freeways at the LA and Orange County Lines. Yet it has been difficult to bring additional jobs to the IE and reduce the jobs/housing imbalance.

The telework initiative can perhaps be a “breakthrough opportunity” to do just that – bring some jobs back to the Inland Empire, at least on a part-time basis. This is also why the telework program needs to emphasize the residential end of the trip, not just the employer end. Having more LA and Orange County employees work at home in San Bernardino or Riverside counties is a potential low-cost method of easing the jobs/housing imbalance, enabled by the simple act of working at home on either a full time or periodic basis. Not only will it provide employers and employees additional options for productivity and work-life balance, but it will potentially be good for our long run local economies (with increase spending near home) together with the clear-cut and cost-effective VMT reduction and GHG reduction benefits.

Opportunity for Voluntary Mitigation Credit Programs

While service to San Bernardino County employers and residents is the primary goal of this initiative, a side benefit could come by creating a system for the capture (in an accounting sense) and application of mitigation credits for reduction of VMT, pursuant to Senate Bill (SB) 743. This could also be done for GHGs as part of the San Bernardino County Regional Greenhouse Gas Reduction program and subsequent local climate action plans (CAPs). There could be benefits for VMT/GHG reduction and for mitigation of impacts brought about by both transportation and development projects, as well as possible assistance for selected employer expenses.

Reducing VMT from land use and transportation projects has traditionally been accomplished through TDM and transit strategies that are often difficult to implement on a project by project basis. As part of the Phase 1 SB 743 Countywide VMT Study, SBCTA provided a memo assessing research related to TDM effectiveness for reducing VMT. The purpose of this work was to understand what options were available to mitigate VMT based on TDM information that has been published in *Quantifying Greenhouse Gas Mitigation Measures, CAPCOA, August 2010*. As expected, the lower-density land use and transportation context for San Bernardino County presents a significant challenge to the effectiveness of common transit and TDM strategies for VMT reduction, even though significant investment is being made in those modes.
Alternative travel choices are much more limited in the Inland Empire than for more dense environments.

However, due to the recent increase in the practicality of telework, this type of regional program-based approach through IE Commuter can now be seen as a realistic strategy for cost-effective VMT reduction. If IE Commuter can implement the telework program effectively, this new area-wide program could be structured to capture the VMT/GHG reductions in the form of credits that can be employed for mitigation of specific VMT and GHG project impacts, overcoming the limitation of less cost-effective on-site mitigation of project impacts. In the development and transportation sector, this concept of “pooling” VMT or GHG reduction credits to mitigate for VMT or GHG impacts is not a new concept, with off-site habitat mitigation being one prominent example. There are at least three concepts that could be explored for potential use as an off-site mitigation strategy for VMT and GHGs.

The recommendation for Board consideration is to authorize staff to develop options for establishing a mitigation crediting system for VMT and GHG reduction that would allow for the voluntary application of those credits to facilitate environmental mitigation of projects in San Bernardino County. The effort would look at feasibility, cost-effectiveness, and potential benefits for the transportation sector, employers, and building industry. Specific proposals, if found to be feasible and beneficial to facilitating project approvals, would be brought back to the SBCTA Board in Fall 2020.

Next Steps
The primary purpose of this agenda item is to obtain SBCTA Board approval of a proposed telework program on July 1, 2020, with initial review by the General Policy Committee on June 10, 2020. This is being done simultaneously by RCTC, with the intent to incorporate the program into the ongoing responsibilities of the IE Commuter consulting team. An approach to marketing of the new tools and direct employer assistance for establishing telework programs is in development. In addition, it can be expected that refinements to these tools and support materials will occur as the program evolves.

With the overall IE Commuter Ridesharing Program well-established, this represents a very good foundation for a successful Telework Assistance Program in San Bernardino County. Special emphasis will occur on telework as the program is rolled out in July, but will become a more integrated and seamless part of what IE Commuter already does. The IE Commuter budget allows for increased emphasis on certain program elements as the need arises, and no additional funding is anticipated to be necessary for the next fiscal year.

A second purpose is to obtain authorization from the SBCTA Board for development of options for a VMT/GHG mitigation credit system. If found to be feasible and beneficial, such a program will take longer to implement, with a current target date of Fall, 2020 for Board direction to staff on a specific proposal. In the intervening months, resources from the Planning Department’s on-call consultants will be enlisted to explore the options, conduct outreach with a range of stakeholders, and bring back a specific proposal for Board consideration, with specific emphasis on voluntary approaches to VMT and GHG mitigation.
Financial Impact:
This item has no impact on neither the Fiscal Year 2019/2020 budget nor the Fiscal Year 2020/2021 budget.

Reviewed By:
This item is not scheduled for review by any other policy committee or technical advisory committee. It was presented for review and comment to members of the City/County Manager Technical Advisory Committee (CCMTAC) on June 4, 2020.

Responsible Staff:
Steve Smith, Director of Planning
Telework
Employer Guidebook
About IE Commuter

IE Commuter is a program of the Riverside County Transportation Commission and San Bernardino County Transportation Authority whose mission is to reduce traffic and improve air quality throughout the region by increasing the awareness and adoption of ridesharing. The program and its services are provided at no-cost to eligible Riverside County and San Bernardino County employers and commuters.

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What is Telework?

Telework is a flexible working arrangement where, instead of commuting to work, employees work from home or a location nearer to their home. Although some organizations succeed with all-virtual staffs, the majority adopt a mix of days in the office and days at home. The most common arrangement is half-time; two or three days a week in the office, the balance at home.

Telework is becoming an increasingly attractive and viable option for companies. Laptop computers, cloud-based document storage and software, effective collaboration and communication tools, and high-speed internet make it easy for employees to be just as effective at home as they are in the office. In addition, telework drastically reduces or even eliminates the daily work commute. This helps employers contribute to improved air quality and traffic reduction as required by air quality regulations such as the Southern California Air Quality Management District’s (SCAQMD) Rule 2202.

The word ‘telework’ is often referred to by other names including telecommute, remote work, mobile work, and work-from-home, but unless the practice reduces commuter travel, it is not considered part of a Telework Program.
Why Start a Telework Program?

Telework is a proven work option that can result in greater productivity, higher employee engagement, improved well-being, increased attraction and retention of talent, reduced cost for both employers and employees, greater organizational agility, and increased sustainability.

Companies that adopt telework programs not only help their bottom line, but also demonstrate that they care about their staff and the environment. Research shows doing both is not only good for employees, it's good for business.

A well designed and implemented Telework Program:

- Increases employee productivity and efficiency (by 10%–20% on average)
- Improves employee morale and reduces stress
- Reduces employee absenteeism (two to four days per year on average)
- Reduces tardiness
- Lowers healthcare-related costs and long-term disability costs
- Expands the talent pool
- Helps attract and retain talent
- Lowers real estate costs, office overhead, and parking needs
- Enhances scalability—both up and down—and organizational agility
- Offers increased hours of service to clients and customers
- Increases flexibility of staff to handle peak workloads
- Maintains business continuity during an emergency or major disaster
- Reduces greenhouse gases and traffic congestion due to fewer vehicle miles traveled

A formal Telework Program:

- Establishes executive support and gives clear direction to managers and employees
- Establishes written policies and practices
- Ensures compliance with labor laws, insurance regulations, and tax laws
- Reduces the threat of discriminatory practices
- Mitigates data security risks
- Documents criteria for job and employee suitability
- Establishes a budget for training and technology
- Establishes employer/employee rights relative to privacy
- Establishes rules regarding use of company-owned equipment and technology
- Establishes program goals and a method for measuring results

How to Start a Telework Program

Planning and implementing a Telework Program requires senior management support, changes in supervisory methods, and trust and flexibility in participating employees. In addition, companies must ensure that employees have the tools and access to information they will need to perform their jobs remotely.

Although many companies offer informal teleworking to select individuals, there are compelling reasons to consider implementing a formal program. Telework may soon become the "new normal" and it is essential to have a formal Telework Program to ensure your business can respond effectively to changes in commuter needs.
Assign a Telework Program Manager

Ideally, the launch of a Telework Program involves leadership from human resources, information technology, real estate and facilities management, risk management, sustainability, legal, and labor organizations. While the program manager can come from any functional area, ideally it is the Employee Transportation Coordinator. They must be empowered by executive management to oversee and drive the initiative.

The Telework Program Manager should:
- Serve as a point person for the Telework Program
- Interface with senior management and offer guidance when issues arise
- Ensure that program requirements are met
- Help analyze and manage costs and benefits
- Help coordinate program funding

Secure Executive Management Support

Support from executive and middle management is critical to the success of a Telework Program. A well-designed business case, which addresses how a Telework Program will benefit employers, employees, and the environment can help gain the support of leadership and other constituents.

A business case for a Telework Program should include:
- Why the program is important
- Why it is important now
- The advantages and disadvantages for employers, employees, and the environment
- Likely obstacles or barriers to success and recommendations for overcoming them
- Any pilot programs or research that supports the initiative
- Program goals and methods for measuring success
- High level review of anticipated budgetary impacts/cost savings

Assess Technology Needs

In order to develop and support a Telework Program, it is essential to understand your organization’s equipment, network connectivity and security requirements. If possible, include your IT department in the assessment as they are a major component of the program.

To implement the technical aspects of a Telework Program:
- Evaluate technological readiness
- Identify what information is needed and by whom
- Establish security protocols for various user groups
- Establish platform and technology requirements for teleworkers
- Establish technology provisioning, reimbursement, stipend policies
- Establish a method for providing technical support to teleworkers
- Establish a budget for hardware, software, and services needed to provision and support a Telework Program
Establish Eligible Positions for Telework

Conduct a jobs assessment to determine which jobs are compatible with telework. Since it is not possible for every employee to work outside the office, you should first look at the tasks which make up each job and decide which ones can be done outside the office.

Begin your evaluation process by asking:

- Can the work, or part of the work, be sent to and from the employee’s home with ease, speed and confidentiality?
- How much face-to-face contact is required with managers, colleagues, clients, or subordinates?
- Is the job subject to unscheduled in-office meetings that cannot be accommodated with remote collaboration technology?
- How important is it for the employee to access equipment, materials, and files located only at the workplace?
- Does the job require the use of specialized equipment?

Draft Telework Program Guidelines

The Telework Program Manager, in conjunction with the Human Resources Department, should draft guidelines that will support, encourage and guide individuals, departments or the entire company throughout the process of implementing and managing a Telework Program. This document should outline responsibilities and expectations for all parties.

Your company’s guidelines may include:

- A program definition and policy statement that outlines your organization’s commitment to telework and how a Telework Program will benefit your business
- Statements addressing the following topics:
  - The basic terms and conditions of employment
  - Terms of the telework agreement
  - Frequency of telework
  - Work week and overtime policy
  - Employee availability on telework days
  - Restrictions around where and when teleworkers can work
  - Workspace requirements
  - Equipment provisioning
  - Security procedures
  - Workers’ Compensation and insurance issues
  - Safety requirements
  - Tax and licensing issues
  - Impact of telework on medical/family leave
  - Telework as a reasonable Americans with Disabilities (ADA) accommodation
- Telework Program agreement
- Teleworker and manager/supervisor training
- Telework Program performance measurements and evaluation procedures

Click to download a program guidelines template, sample program agreement form, and sample surveys,
Develop An Implementation Plan

The implementation plan should include:

- Assignment of tasks and deliverables
- A timeline for pilot programs, implementation or phasing
- Communication guidelines
- A budget
- Training requirements and delivery plan
- Evaluation procedures and measurement plan

Establish communication guidelines

Clear communications between managers and teleworkers are critical to success. Managers should be trained to manage by results rather than employee presence or hours, but regular check-ins and status updates ensure managers and employees are on the same page. Micromanagement should be avoided as it is unproductive and runs counter to managing by results. In general, teleworkers and their managers should communicate more, rather than less than they did as office workers. Individual managers and employees may have their own communication preferences, but communications guidelines should include:

- How often teleworkers and managers should communicate
- Preferred methods for communicating
- Etiquette and best practices around the use of email, chat, videoconferencing, the phone, cloud platforms, face-to-face or other means of communication
- Expectations for response time
- Communications outside of normal working hours
- Getting in touch in the event of an emergency

Implement a Pilot Program

Before rolling out a formal Telework Program, companies generally start out with a pilot program. Implementing a pilot allows companies to assess the program and identify what is and is not working, and then make modifications and improvements based upon the experience. A pilot program runs for a specific period of time (usually six months). The trial period is designed to test the effectiveness of your policies and procedures, guidelines, training, communication methods, and other program components. Program improvements or modifications can be added at any time.

Key items for your pilot program

- Include a varied cross-section of jobs, staff and departments for a greater assessment of program needs, or start within one department where managers support the idea of telework. Once the pilot program begins, managers and participating employees should communicate regularly to provide program feedback, address any issues that arise, and fine-tune wherever possible
- As the pilot program concludes, and objectives are met, the organization should prepare to rollout the program on a larger scale
- If objectives are not met on schedule, conclude the pilot, document the lessons learned, and determine whether or not the issues can be resolved. If so, consider extending the pilot for an additional six-month period
- The Telework Program Manager should review established criteria and measurements, obstacles, concerns, unexpected results and then revise the implementation plan
Develop a financial plan

Expenses associated with Telework Programs include both start-up expenses such as training programs and equipment purchases, as well as continuing expenses such as data security and costs attributed to equipment maintenance and ongoing communication. To keep expenses at start-up minimal, companies may initially build their telework programs around existing remote access and employees who have access to laptop computers.

- Use the Telework Benefit/Cost Worksheet to help determine potential costs and savings to your company
- Work with the appropriate departments within your company to draft a budget and determine who will oversee it

Improving Your Telework Program

Get The Word Out

Get the word out about the telework program to management and appropriate staff. This can be done in a number of ways, including meetings, memos, e-mails and information briefings. Make sure the information comes from the CEO or upper management to demonstrate management’s support of the program.

If your company is limiting its telework program to certain departments, the communication may be sent to eligible departments, and an abbreviated version may be sent to the remaining departments. Both versions should explain why some jobs are being included and others excluded.

The communication may include:

- A description of the telework program
- Program goals
- Eligibility criteria
- Telework Program Manager contact information
Train Your Staff
No matter how well designed your telework program is, it won’t work unless staff know how to use it. Most companies include training for both the telework employees and their managers. Training for all participants should focus on program goals and objectives.

Topics for teleworker training may include:
- Telework policies and guidelines
- Time management
- Communications protocols
- Technology training and security procedures
- Workers’ Compensation and injury reporting procedures
- Strategies for working effectively at home
- How to communicate effectively with co-workers and managers
- How to deal with family, friends and others
- Setting up an ergonomic home office
- Contacts and process for answering questions and resolving problems

Topics for manager training may include:
- Telework policies and guidelines
- Work planning and scheduling
- Effective communication
- Goal setting
- Managing by results
- Monitoring performance
- Providing feedback and coaching
- Data security and privacy policies and practices

Measuring Success

Develop Evaluation Procedures
An ongoing monitoring program is key to establishing the success of your company’s telework program and determining whether or not goals and objectives are being met. Surveys, interviews and/or focus group meetings are recommended to obtain this information.

If goals and objectives have not been met, an evaluation will help direct needed changes which may be important in determining program continuation. The program should continue to evolve and grow over time as the company becomes more experienced with telework, and as business needs and information technology change.

Some questions to include through the evaluation process:
- Are goals and objectives being met? (Be very specific)
- Are managers satisfied with teleworker performance?
- Has there been an impact on productivity? If so, what?
- Has there been an impact on operating costs?
- Has there been an impact on absenteeism rates?
- Has there been an change to employee morale?
- Has there been an impact on recruitment and retention?
- Is technology adequate and available?
- Are communications being maintained at an acceptable level?
- What do teleworkers and their managers like most (and least) about the telework program?
- Has there been an impact on customer/client satisfaction?
Resources

For more information and assistance in setting up your Telework Program, email Telework@IECommuter.org or contact your IE Commuter Employer Services Representative.

Sample Documents

To help you develop your Telework Program we’ve included sample files that you can use as reference. Feel free to use them as starting point in creating your program documentation.

Included in this guidebook:

- Telework Program guidelines template
- Telework Benefit/Cost worksheet
- Telework Program agreement
- Teleworker survey
- Teleworker supervisor survey
- Telework job performance survey

Visit IECommuter.org/employertelework to download the individual sample documents.
### sample telework guidelines

**Purpose**

(Company) has developed Telework Guidelines to make working at a remote workplace an effective way to meet company and employee needs. All departments will follow these guidelines to promote consistency in implementing and measuring the success of the telework program.

Note: Telework is a management option, not an employee right; therefore, telework is not an option that an employee can demand or has a right to expect. It is, instead, an option that management uses whenever it decides that it is most appropriate for the situation and circumstances. This is a voluntary program and the arrangement can be terminated at any time for any individual employee(s) or as a program, if it is determined that the Company’s needs are not being met.

### To Obtain Telework Forms

Contact Human Resources.

Objectives of these Guidelines

These guidelines are intended to encourage and structure telework and to provide a general framework for departments to adapt telework as a work option in their area, thus helping to achieve the Company’s strategic objectives. These objectives include:

- Increase employee productivity and improve overall productivity of the Company
- Make optimal use of Company office facilities and equipment
- Reduce traffic congestion and improve air quality by demonstrating that the Company is a leader in using telework as a transportation demand management strategy
- Encourage employee retention

### Definition

Telework is working from a remote workplace, such as home, instead of commuting to the employee’s usual Company work address. Telework normally occurs on a regular schedule (one or more days each week or month). Intermittent telework is also permitted based on these guidelines.

### Telework Agreement

The Telework Agreement clearly establishes the roles and responsibilities between a teleworking employee and that employee’s supervisor. This agreement must be signed by both parties prior to beginning telework, and must be reviewed at least semi-annually to ensure that the telework guidelines are well understood. A copy of the signed agreement will be forwarded to the Telework Program Manager.

### Responsibilities

The Telework Program Manager, with the help of the Telework Steering Committee, will:

- Brief all applicable departments on the purpose, process, goals, and benefits of telework
- Survey supervisors and teleworkers after six months of program implementation for evaluation purposes
- Provide a telework training session for teleworkers, supervisors, and involved staff
- Be responsible for implementing the Company’s employee telework program and act as the point of contact for the telework program
- Answer employees’ questions regarding telework and process any complaints or appeals which may arise between the teleworker and the supervisor
- Verify compliance with telework policy and procedures
- Report and make recommendations to the Executive Director based on the program’s progress, to determine whether the program should be revised or modified

### Management will:

- Identify jobs, teleworkers, and supervisors within their organizational unit that meet the criteria established in these guidelines
- Actively encourage telework as a means of fulfilling the Company’s objectives, where applicable
- Verify that all departments and sections apply the same criteria and follow the Telework Guidelines
- Maintain control over Company-owned property used by teleworkers through written receipts for property as part of the Teleworker’s Assignment Form

### Telework Implementation Process

<table>
<thead>
<tr>
<th>Step</th>
<th>Responsible Party</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Supervisor</td>
<td>Determine operational needs for his or her section.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Evaluate employees to ensure compliance with the established criteria.</td>
</tr>
<tr>
<td>2</td>
<td>Manager</td>
<td>Approve or deny the request and notify the supervisor of the decision.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Coordinate with the necessary staff to determine availability of resources.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ask eligible employees about their interest in potentially teleworking.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Recommend approval or denial of telework candidate(s).</td>
</tr>
<tr>
<td>3</td>
<td>Supervisor</td>
<td>Notify the employee of the decision. If approved, the process moves to the next step. If denied, the supervisor provides written notification, including the reason for denial.</td>
</tr>
<tr>
<td>4</td>
<td>Employee and Supervisor</td>
<td>Complete telework training.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Complete a Telework Agreement and both sign.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Develop a telework schedule.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Develop performance standards for specific tasks to be completed the next telework period (one day, two days, etc.)</td>
</tr>
<tr>
<td>5</td>
<td>Employee</td>
<td>Sign for receipt of Company-owned equipment (if applicable).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Begin teleworking.</td>
</tr>
<tr>
<td>6</td>
<td>Supervisor</td>
<td>Approve time (hours worked) and work accomplished for each Telework period.</td>
</tr>
</tbody>
</table>

### Sample Telework Guidelines

**Supervisors will:**

- Approve or deny Teleworker Assignment based on the criteria in these guidelines
- Be responsible for the day-to-day performance of teleworking employees, just as with other employees under their supervision
- Coordinate hardware and software administrative and technical needs with their Information Technology staff

**Employees will:**

- Comply with the Company’s Telework Policy
- Complete telework training before telework begins
- Abide by the terms of their Telework Agreement and the Telework Guidelines

**Information Technology staff will:**

- Be responsible for coordinating teleworkers’ equipment and technology needs
- Coordinate equipment repairs
- Establish standard hardware and software configurations for providing connections to Company-wide area and local area networks in a telework environment
- Address any telework-related information security considerations
sample telework guidelines

Employee Criteria
Employees interested in teleworking must meet the following criteria (which can be gathered from the employee’s previous performance evaluations):

- Have the ability to work well with minimal supervision
- Have a thorough knowledge and full understanding of the operations of his/her work tasks
- Have a history of reliable and responsible accomplishment of work duties
- Have demonstrated ability to establish priorities and manage his or her time

Job Criteria
Jobs acceptable for telework are those that can be performed at a remote site without diminishing the quality of the work or disrupting the productivity of the office.

Work Environment Criteria

Scheduling Criteria
The operational needs of the Company take precedence over the employee’s telework days. A teleworker must forego telework if needed in the office on a regularly-scheduled telework day, but should be given as much notice as possible.
Supervisors may allow for flexibility in scheduling the specific days of the week used for telework and allow week-to-week flexibility to meet changing Company or employee needs.
As with any work schedule, temporary telework assignments or changes in work schedules may be made at management discretion to meet Company needs or to accommodate an employee’s request.
Employees and their supervisors will plan telework schedules.
Teleworkers must maintain communications and be available for contact as if the employee were working on reducing telework hours.
Teleworkers report to their designated worksite as required by their agreement.

Equipment and Software

Equipment and Software
Each manager is responsible for all equipment within his or her department. When Company equipment is used at a remote workplace, the employee is financially responsible for that equipment if it is lost, stolen or damaged because of the employee’s negligence, misuse, or abuse. The following policies apply to all Company and employee-owned hardware and/or software used in telework:

- All hardware and software used must be approved by IT staff before installation.
- Any hardware or software purchased by the Company remains company property and will be returned if either employment or the Telework Agreement is terminated.
- Products/programs the employee develops while teleworking for the Company remain the property of the Company.
- Employees are required to follow all Company computer security rules, software copyright laws, and manufacturer’s licensing agreements. Company-owned software may not be duplicated.

Work-Related Injury, Health and Safety

Teleworkers must use Company-approved communication software when connecting with the Company network.

Equipment Preventive Maintenance, Repair and Replacement

Equipment Preventive Maintenance, Repair and Replacement
Preventive maintenance and repair of equipment used by a teleworker is the responsibility of the owner of the equipment.
If equipment malfunctions, regardless of ownership, the teleworker must notify his or her supervisor immediately. Depending upon assigned duties, the teleworker may be required to report to the office until the equipment is usable.
Any change in the teleworker’s remote workplace that involves relocation of installed equipment owned by the Company must be approved in advance.

Work-Related Injury, Health and Safety

Teleworking employees are expected to maintain the same standards of health and safety at their remote workplace as they are at their usual company work address.
If an employee suffers a work-related injury while teleworking, workers’ compensation laws and rules apply just as they would if such an injury were to occur at their usual Company work address.

Program Components

Employee Benefits
All forms of telework imply an employer/employee relationship, with the employee receiving the same benefits and having the same responsibilities as a non-telework employee. Therefore, employee benefits provided for in the Human Resource Manual, including leave time, holidays, compensation, etc., are not affected by participation in a telework program.

Participation in Studies and Surveys
Employees and supervisors may be required to participate in surveys and analyses for evaluation of the telework program.
Here is a worksheet to help you estimate some of the key benefits and costs associated with establishing a telework program. Actual results may vary.

### Benefit to Employer per Teleworker

<table>
<thead>
<tr>
<th>Benefit to Employer per Teleworker</th>
<th>Recurring</th>
<th>Sample Recurring Yearly Benefit</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased employee productivity</td>
<td></td>
<td>$6,000</td>
<td>(On average, productivity increases 10 – 20%)</td>
</tr>
<tr>
<td>(On average, productivity increases 10 – 20%)</td>
<td></td>
<td>[annual salary of potential teleworker] x [10 – 20%]</td>
<td></td>
</tr>
<tr>
<td>Increased organizational effectiveness</td>
<td></td>
<td>$800</td>
<td>(On average, about 2%)</td>
</tr>
<tr>
<td>(On average, about 2%)</td>
<td></td>
<td>[annual salary of potential teleworker] x [2%]</td>
<td></td>
</tr>
<tr>
<td>Decreased employee absenteeism</td>
<td></td>
<td>$522</td>
<td>(On average, teleworking reduces absenteeism by 2 - 4 days/yr)</td>
</tr>
<tr>
<td>(On average, teleworking reduces absenteeism by 2 - 4 days/yr)</td>
<td></td>
<td>[daily salary of potential teleworker] x [3 (days)]</td>
<td></td>
</tr>
<tr>
<td>Decreased employee turnover rate</td>
<td></td>
<td>$2,000</td>
<td>(Avoid equivalent of 5% of salary for search and training costs)</td>
</tr>
<tr>
<td>(Avoid equivalent of 5% of salary for search and training costs)</td>
<td></td>
<td>[annual salary of potential teleworker] x [5%]</td>
<td></td>
</tr>
<tr>
<td>Reduced parking requirements</td>
<td></td>
<td>$360</td>
<td>(On average 30% reduction (part-time) and 95% reduction (full-time)*)</td>
</tr>
<tr>
<td>(On average 30% reduction (part-time) and 95% reduction (full-time)*)</td>
<td></td>
<td>[monthly parking cost] x [30%] for potential part-time teleworker or x [95%] for potential full-time teleworker; then [resulting number] x [12 (months)]</td>
<td></td>
</tr>
<tr>
<td>Office space savings requirements</td>
<td></td>
<td>$3,240</td>
<td>(On average 30% reduction (part-time) and 95% reduction (full-time)*)</td>
</tr>
<tr>
<td>(On average 30% reduction (part-time) and 95% reduction (full-time)*)</td>
<td></td>
<td>[office space square footage which can be proportionally reclaimed] x [30%]; then [resulting number] x [your company’s monthly cost per sq. ft] x 12 (months)</td>
<td></td>
</tr>
<tr>
<td>Total Annualized Benefit per Teleworker</td>
<td></td>
<td>$12,922</td>
<td>To get total annualized benefit per teleworker; add column totals together</td>
</tr>
</tbody>
</table>

Note: Other benefits may include decreased air pollution resulting in meeting air quality regulations & increased business competitiveness.

* JALA International Inc. Sample numbers assume: $40,000 annual salary, 15% increase in employee productivity, 230 work days/year, parking costs @ $100/month, 150 sq. ft. office space @ $6/month per sq. ft

### Cost to Employer per Teleworker

<table>
<thead>
<tr>
<th>Cost to Employer per Teleworker</th>
<th>One-time Cost</th>
<th>Recurring Yearly Cost</th>
<th>Sample One-time Cost</th>
<th>Sample Recurring Yearly Cost*</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selection and Training</td>
<td>$_____</td>
<td>$_____</td>
<td>$175</td>
<td>$0</td>
<td>Training cost for teleworker (and supervisor). Hiring a training consultant is an option</td>
</tr>
<tr>
<td>Computer, printer, software, voice and data telecommunications, etc.</td>
<td>$_____</td>
<td>$_____</td>
<td>$960</td>
<td>$1,035</td>
<td>One-time cost is usually zero if Recurring cost for phone line/modem</td>
</tr>
<tr>
<td>Home office set up; furniture, file cabinet, etc.</td>
<td>$_____</td>
<td>$_____</td>
<td>$1,200</td>
<td>$0</td>
<td>One-time cost is zero if supplied by employee. Include moving costs</td>
</tr>
<tr>
<td>Other</td>
<td>$_____</td>
<td>$_____</td>
<td>$0</td>
<td>$70</td>
<td>Equipment liability insurance if applicable, etc.</td>
</tr>
<tr>
<td>Annualized Cost</td>
<td>$_____</td>
<td>$_____</td>
<td>$2,335</td>
<td>$1,105</td>
<td>Add column totals</td>
</tr>
<tr>
<td>Total Annualized Cost</td>
<td>$_____</td>
<td>$_____</td>
<td>$3,440</td>
<td></td>
<td>To get total annualized cost, add total one-time cost and total recurring cost together</td>
</tr>
</tbody>
</table>

Note: Due to one-time costs, telework program expenses should decrease after the first year for the same teleworkers

### Total Annualized Benefit

<table>
<thead>
<tr>
<th>Total Annualized Benefit</th>
<th>$_____</th>
<th>Sample Total Annualized Benefit</th>
<th>$12,922</th>
</tr>
</thead>
</table>

### Total Annualized Cost

<table>
<thead>
<tr>
<th>Total Annualized Cost</th>
<th>$_____</th>
<th>$3,440</th>
</tr>
</thead>
</table>

### Net Benefit per Teleworker

<table>
<thead>
<tr>
<th>Net Benefit per Teleworker</th>
<th>$_____</th>
<th>$12,922</th>
</tr>
</thead>
</table>

* JALA International Inc. Sample numbers assume: $40,000 annual salary, 15% increase in employee productivity, 230 work days/year, parking costs @ $100/month, 150 sq. ft. office space @ $6/month per sq. ft
This Agreement, effective the ______ day of ______, 20___, by and between ______ (Employee), and the ______ (Company), acting by and through ______ (Supervisor), establishes the respective obligations of the parties under the Company’s telework program. Employee has volunteered to work as a “teleworker” at a location other than the usual company work address, such location being described in the Teleworker’s Assignment, attached hereto and made a part hereof for all purposes.

This Agreement is not an employment contract or a guarantee of employment and is not to be construed as such. The Company is an “at will” employer. The unenforceability of any provision of this agreement shall not affect the remainder of the agreement.

Both parties will abide by the Company Human Resources Manual and any changes thereto. In case of a conflict between the manual and this agreement, the manual will control.

Termination of an Employee’s participation in the telework program is not, by itself, grounds for a complaint or subject to appeal.

Work Location
The terms “remote work location” or “remote workplace” shall mean Employee’s home or other location approved by Employee’s supervisor. The term “onsite” shall mean Employee’s usual and customary Company work address.

The Company must approve the site chosen as Employee’s remote workplace. Employee agrees that the Company may make onsite visits to the remote workplace during the teleworker’s work hours. Any visits shall be made at a mutually agreeable time for the purposes of picking up or delivering work, equipment, or materials, evaluating the telework arrangement, or checking or maintaining Company-owned equipment.

Employee must work onsite when not at the remote workplace. Employee’s supervisor shall ensure that Employee has an adequate work area when onsite.

Supplies and Equipment
The Company may, at its sole discretion, choose to purchase equipment and related supplies for use by Employee or may permit the use of Employee-owned equipment. Costs of supplies purchased by Employee shall not be reimbursed without prior approval.

The decision as to the type, nature, function and/or quality of electronic hardware, computer software, data, and telecommunications equipment used (e.g., telephone lines) shall rest entirely with the Company. The decision to remove or maintain Company-owned property that is paid by Employee’s homeowner’s policy will be reimbursed to the Company.

Employee shall notify supervisor immediately in case of injury.

Employee Duties and Obligations
Employee shall participate in telework surveys, reports or analyses relating to telework for the Company, as requested.

Employee shall comply with all applicable laws, policies, and instructions regarding conflicts of interest and confidentiality.

Employee shall comply with all Company rules, policies, practices, instructions, telework guidelines, and this Agreement.

Employee understands that violation of such may result in cancellation of this Agreement and/or disciplinary action, up to and including termination of employment.

Termination of Agreement
This is a voluntary program. This Agreement shall remain in effect for six months unless terminated by either party, with or without cause, under the terms set forth in this agreement.

The Company reserves the right to terminate the agreement at any time, with or without notice for any individual Employee or as a program. The Employee may terminate this agreement at any time with 10 working days’ notice.

The Company will not be held responsible for costs, damages, or losses associated with the termination of this Agreement.

Upon termination of this Agreement by either party, Employee shall return to the Company all notes, data, reference materials, sketches, drawings, memorandum, reports, records, equipment, supplies, and all other Company documents in Employee’s possession or control.

The Teleworker Assignment form shall become an attachment to this agreement.

I affirm by my signature below that I have read this agreement and understand its subject matter.

Employee’s Signature __________________________ Date __________

Supervisor’s Signature __________________________ Date __________

Department Director’s Signature __________________________ Date __________
This form is to be used 6 months after telework begins. If you have stopped teleworking, please complete the survey based on your experience while you were teleworking.

1. Indicate whether you agree with the following statements.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. My supervisor is supportive of telework</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. I receive adequate feedback on my job performance from my supervisor</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Most of the meetings I attend are scheduled at least a day or two in advance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. I usually decide how to complete the projects assigned to me</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. Telework allows me the flexibility to work during my most productive hours</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. How stressful is your job in the following respects?

<table>
<thead>
<tr>
<th>Area</th>
<th>Very stressful</th>
<th>Somewhat stressful</th>
<th>Not at all stressful</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Volume of work</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Scheduling work</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Office politics</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. Job security</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. Managing multiple projects</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Rate your current job performance in the following areas.

<table>
<thead>
<tr>
<th>Area</th>
<th>Excellent</th>
<th>Very Good</th>
<th>Good</th>
<th>Meets requirements</th>
<th>Needs improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Productivity</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Interpersonal skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Dependability</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. Communication skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. Ability to work independently</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F. Overall performance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. As a result of teleworking, have your work skills changed in any of these areas?

<table>
<thead>
<tr>
<th>Area</th>
<th>Improved</th>
<th>No change</th>
<th>Declined</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Productivity</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Dependability</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Communication skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. Ability to work independently</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. Project management</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F. Time management</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

5. In general, have you had any problems using the equipment?

- [ ] No
- [ ] Yes

If yes, check the statements that apply:

- [ ] It was difficult to get help when the equipment wasn't working
- [ ] It was difficult to get help when the software wasn't working
- [ ] Other: (please explain)

6. As a result of teleworking, have there been any changes in the quality of your relationships with the following people?

<table>
<thead>
<tr>
<th>Area</th>
<th>Improved</th>
<th>No change</th>
<th>Worsened</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Professional staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Support staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. Clients</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. In what ways could teleworking be improved?

8. How interested are you in continuing to telework?

<table>
<thead>
<tr>
<th>Interest Level</th>
<th>Very interested</th>
<th>Interested</th>
<th>Neutral</th>
<th>Not very interested</th>
<th>Not at all interested</th>
</tr>
</thead>
</table>

Your responses will be kept confidential.

Name: ____________________________  Job title: ____________________________
Department: ____________________________  Work Phone: ____________________________
This form is to be used 6 months after telework begins. If your employee has stopped teleworking, please complete the survey based on your experience while the employee was teleworking.

1. Indicate whether or not you agree with the following statements.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Upper management is supportive of telework</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. I had sufficient influence on who was chosen to telework</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. I am supportive of my employee(s) who telework</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. When working away from the central office, my staff is able to complete their work</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. Telework improves my company’s ability to retain competent staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F. Because of telework, communications in my work group are more difficult</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G. My teleworker(s) are less integrated with their work group as a result of telework</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H. Telework allows people the flexibility to work during their most productive hours</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I. I let my workers decide how to complete projects</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>J. Some people take advantage of telework to work fewer hours</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K. It is more difficult to measure the productivity of teleworkers when they work offsite</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>L. Teleworkers are not around when I need them</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>M. It takes a lot of my time to supervise a teleworker</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>N. Telework enhances job satisfaction</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>O. Advantages of telework outweigh disadvantages</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. What are the most successful aspects of telework?

________________________________________________________________________
________________________________________________________________________

3. What are the least successful aspects of telework?

________________________________________________________________________
________________________________________________________________________

4. How has telework affected your company?

________________________________________________________________________
________________________________________________________________________

5. Please describe any significant change in your work group due to telework.

________________________________________________________________________
________________________________________________________________________

6. In what ways could telework be improved?

________________________________________________________________________
________________________________________________________________________

7. How interested are you in seeing telework continue?

Very interested                 Interested             Neutral                  Not very interested    Not at all interested

8. As a result of telework, has there been any change in the workload of the non-teleworkers in the following categories?

<table>
<thead>
<tr>
<th>Category</th>
<th>Much more</th>
<th>More</th>
<th>No change</th>
<th>Less</th>
<th>Much less</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Professional staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Support staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

9. How many employees do you supervise directly?

________ Full-time _______ Part-time

10. List the names, job titles, and number of telework days per month of all employees you supervise who telework.

<table>
<thead>
<tr>
<th>Name</th>
<th>Job title</th>
<th>Number of days per month</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Your responses will be kept confidential.

Name: ___________________________ Job title: ___________________________
Department: _____________________ Work Phone: _________________________

23
sample job performance survey

Complete a copy of this section for each teleworker you supervise.

Your Name:_____________________________ Teleworker’s Name:______________________________ Date:___________

1. How often do you currently communicate with your teleworker?

<table>
<thead>
<tr>
<th>At least once/day</th>
<th>2-4 times/week</th>
<th>About once/week</th>
<th>About once/month</th>
<th>Less than once/month</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. In person meetings</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>B. Telephone calls</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>C. E-mail</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>D. Fax</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>E. Notes</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

2. Indicate whether you agree with the following statements.

<table>
<thead>
<tr>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. I closely monitor how this employee uses his/her time</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>B. This employee works best when there is a deadline</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>C. This employee is highly motivated</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>D. This employee’s job description fits very well with telework</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>E. Telework will make it harder for this employee’s co-workers</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

3. Rate this employee’s job performance in the following areas.

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Very good</th>
<th>Good</th>
<th>Meets minimum requirements</th>
<th>Needs improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Productivity</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>B. Interpersonal skills</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>C. Dependability</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>D. Communication skills</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>E. Ability to work independently</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>F. Overall performance</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

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The Los Angeles County Metropolitan Transportation Authority and Global Workplace Analytics contributed to the content of this document.