



Telework Tools

**Employer resource for implementing
a telework program**

AUGUST 2016



Introduction

Telework can be offered by employers to allow selected employees to work at home or at an office close to home on a part-time to full-time basis.

Teleworking offers a number of benefits for both employers and employees. Employers can reduce office overhead costs and transit expenses. Meanwhile employees can save money, time and stress by skipping their regular commute once in a while.

This guide provides the following sample documents for implementing a telework program:

- Steps to Implement a Telework Program
- Program Policy
- Surveys for Managers and Employees to Assess Appropriateness of Telework Arrangements
- Telework Agreement

Steps to Implement Telework

Explore telework program goals and objectives.

Assess the potential organizational and employee benefits.

Coordinate Staff

Gain management commitment to pilot, implement or expand telework.

Confer with influential managers to introduce telework to build comfort with possible new practices and get insight on developing pilot.

Form a steering committee (usually consisting of Human Resources, Informational Technology and Management) to develop telework projects/programs.

Select one or more staff to coordinate. Coordinators should have decision-making ability to convene an internal steering committee and to serve as the main contact for pilot development and implementation.

Develop policies and agreements for telework arrangements; clarify employee and employer roles and responsibilities; create parameters for selecting organizational units that may participate in telework; and consider other operational issues.

Assess positions within organizational units to determine which jobs are most conducive to telework.

Select employees based on criteria such as performance, tenure, grade and work style whose jobs are conducive to telework.

Assess costs and savings to determine any added savings or expenses as a result of telework implementation.

Train managers & employees to ensure a complete understanding of company policies and what it takes to be successful in managing and conducting work with telework schedules.

Implement and evaluate a test or pilot to assess impacts such as communication, technology, teamwork, productivity and morale.

Employ tools to measure performance of organizational units and employees participating in telework that can be compared to performance of organizational units and employees not participating. Identify what might drive further consideration.

Evaluate the pilot projects using performance metrics and employee and manager surveys and focus groups.

Expand use of telework as warranted, based upon the results.

[Type your company name here]

Sample Telework Policy

Edit this form to fit your telework program.

Find and replace [Company name] with your company's name.

[Company Name] has established a program to examine how teleworking can contribute to organizational objectives and employee well-being. These guidelines offer direction for teleworkers, employees not teleworking, and management.

Purpose

Teleworking, the practice of working at home for a limited number of days instead of working in [Company Name] office, is a work alternative that [Company Name] offers to some employees when it is advantageous to both [Company Name] and the employee. Teleworking is a work place strategy that helps employees balance the demands of their work and personal lives. Teleworking is a workplace strategy and not an employee right.

An employee's compensation, benefits, work status, and work responsibilities will not change due to participation in the teleworking program. Teleworking employees must comply with all organizational rules, policies and procedures.

Eligibility

Candidates for teleworking must be a full time [Company Name] employee with a history of satisfactory or better job performance ratings. The opportunity to telework must be approved by an employee's supervisor, who is ultimately responsible for decisions to continue or discontinue teleworking by the employee, following appropriate notification to the teleworker.

Selection of employees to participate in the Teleworking Program shall be based on specific, written, work related criteria including:

- Employee responsibilities
- Need for, and nature of, interaction with other staff and external clients
- Need for use of specialized equipment
- Availability of other qualified employees on site
- Employee job performance

An employee that is considered for teleworking must be able to work independently, be a self-starter, and demonstrate skills managing time in a productive manner. An employee must have a satisfactory or better performance level with no record of performance or conduct issues. The resources that an employee needs to do his/her job must be easily transportable or available electronically.

The decision to allow an employee to telework will be made by the employee's supervisor in consultation with Human Resources.

Eligibility and suitability of employees to participate in teleworking will vary among departments and business units, depending on the function and responsibilities of the employee. Each department must

maintain some minimum complement of employees who work on site at the [Company Name] office in order to function effectively.

Teleworking is not an alternative to child or elder care and, when applicable, the teleworker must make appropriate arrangements for dependent care.

Schedules and Hours

Telework hours may be different from office work hours, however, teleworkers and their supervisors must agree on the designated work hours. A regular teleworking schedule, including specific days and hours, must be established by the teleworker and approved by their supervisor. Generally, a teleworker will spend one to two days working from home with the remainder of the scheduled hours working in his/her office on [Company Name]'s premises. The amount of time the teleworker is expected to work per day or per pay period will not change due to participation in the teleworking program.

Overtime hours must be pre-approved in writing by the supervisor. Deviations from the agreed upon schedule must be approved in advance by the supervisor. [Company Name] policy will be followed for all absences. Teleworkers are responsible for keeping and submitting accurate records of their work hours.

Supervisors retain the right to require a teleworker to return to [Company Name]'s office on a regularly scheduled teleworking day should work situations warrant such an action. This situation is expected to be only an occasional occurrence. If a teleworker is required to return to [Company Name]'s office during regularly scheduled teleworking days frequently, the supervisor may re-evaluate the compatibility of the teleworker's position and job responsibilities with respect to teleworking or the specific teleworking schedule.

Teleworkers are required to account for all time worked in accordance with [Company Name]'s current timekeeping policies. It is the teleworker's responsibility to submit an accurate accounting of hours worked in a timely manner. If a teleworker is sick while working at home or uses other time off, the teleworker must report hours actually worked on his/her timesheet and use composite leave for the remainder of the hours. Non-exempt teleworkers may perform overtime work only after receiving approval from their supervisor.

Workspace

Teleworkers must have an appropriate work area in their home that considers ergonomics, equipment, adequate workspace, noise, and interruption factors. The teleworker's off-site workspace should provide an adequate work area, lighting, telephone service, power and temperature control. Additional requirements may vary, depending on the nature of the work and the equipment needed to perform the work.

[Company Name]'s liability for job-related accidents will continue to exist during the approved work schedule and in the teleworker's designated work location since the teleworker's homework space is an extension of [Company Name] workspace. The designated work location must meet OSHA safety rules for the workplace including: smoke detector; working fire extinguisher; clear, unobstructed exits; removal of hazards that could cause falls; adequate electrical circuitry, and appropriate furniture. If an at-home injury occurs, the teleworker must notify his/her supervisor immediately and follow [Company Name] policy for on-the-job injury. The teleworker must agree to follow common safety practices and provide a safe work area for the employee and others who enter it.

Homeowner's insurance and any changes in rates or coverage are the responsibility of the employee. Any increase in the teleworker's home utility costs (excluding increased telephone costs) is the responsibility of the employee.

Federal and state statutory abstracts will be posted at the teleworker's [Company Name] office location in lieu of posting them in the employee's home office. Teleworkers should review these notices while on [Company Name]'s premises.

Teleworkers should consult their attorney, tax advisor or accountant regarding any legal or tax implications attendant to working at their home or alternative site.

Equipment and Supplies

In most cases teleworkers will provide their own equipment. Teleworkers may use [Company Name]-owned equipment at their off-site workspace with the prior approval of their supervisor provided that the equipment will be used for [Company Name] work only and its use by a teleworker at his/her off-site workspace will not impede the work of employees working at the [Company Name] office.

Office supplies will be provided by [Company Name] and should be obtained during the teleworker's in-office work period. Out-of-pocket expenses for supplies normally available in the office will not be reimbursed. Teleworkers are responsible for all supplies, equipment, and/or materials provided by [Company Name]. All items remain property of [Company Name] and may not be used for personal or other than [Company Name] use.

[Company Name] will reimburse teleworkers for other business-related expenses, such as long-distance phone calls, shipping costs, etc. that are reasonably incurred in accordance with job responsibilities and approved by the supervisor in accordance with [Company Name]'s regular policies. Appropriate documentation is required if such expenses are submitted for reimbursement. Human Resources will work with teleworking employees to ensure that appropriate arrangements have been made for discounted long distance telephone services.

[Company Name] does not assume liability for loss, damage or wear of employee owned equipment unless otherwise agreed to in writing prior to the occurrence. Maintenance, repair and replacement of [Company Name]-owned equipment issued to teleworkers is the responsibility of [Company Name]. In the event of equipment damage or malfunction, the teleworker must notify his supervisor immediately. [Company Name] reserves the right to enter the home work area for inspection of the equipment, if necessary. Repairs to employee owned equipment is the responsibility of the teleworker. In either situation, the teleworker may be asked to report to the office until the equipment is usable.

Teleworkers must take appropriate action to protect company-provided equipment from damage or theft. [Company Name] equipment must be returned to [Company Name] when an employee terminates or discontinues the teleworking arrangement.

Teleworkers can use their own equipment (e.g., fax machine, printer, photocopier) provided that no cost is incurred by [Company Name]. Repair and maintenance of employee-owned equipment is the responsibility of the teleworker.

Employee Access and Availability

Teleworkers must be available by telephone or email during scheduled hours, with the exception of their scheduled lunch period.

Teleworkers are required to modify their [Company Name] voicemail announcement to indicate that they may be reached at an alternate number or that the employee will be regularly checking messages. Supervisors may establish that employees are required to check for messages within a certain period (e.g. at least once every two hours).

Teleworkers must keep their supervisor notified of any changes to their home contact information.

Security

It is the responsibility of the teleworker to take all precautions necessary to secure proprietary information and to prevent unauthorized access. The teleworker is required to observe all office security practices when working outside [Company Name]'s office to ensure the integrity and confidentiality of proprietary information. Steps to ensure the protection of proprietary information include, but are not limited to, use of locked file cabinets, disk boxes and desks; regular password maintenance; and any other steps appropriate for the job and the environment.

Teleworkers agree to allow an authorized [Company Name] representative access to the home work area during prearranged times for business purposes as deemed necessary by the supervisor, including safety inspections, equipment installations and repairs, security assurance, retrieval of [Company Name] property, and performance evaluations. To ensure hardware and software security, all software used for teleworking must be approved by the supervisor prior to installation, and only approved bulletin board systems may be contacted. All software used for teleworking must be virus inspected and each PC must have virus protection software installed. [Company Name] owned software may not be duplicated unless authorized through the license agreement. Restricted access materials shall not be taken out of the office or accessed through the computer unless approved in advance by the supervisor.

Liability

It is the responsibility of the teleworker to maintain a safe, professional work site at home that is free from potential safety problems. Teleworkers must certify that their home is free from workplace hazards by completing a safety checklist.

In the case of an injury while working at home, teleworkers must immediately (or as soon as circumstances permit) report the injury to his/her supervisor or the Human Resources Department and request instructions for obtaining medical treatment.

Application Process

Employees wishing to telework are required to submit a written request. The employee will complete a Teleworker Selection Survey and provide information concerning job responsibilities, proposed teleworking schedule, types of work tasks and activities to be performed at the off-site work space, and description of the off-site work space and the equipment required.

Teleworkers will be required to sign a Teleworking Agreement and complete associated documentation.

Teleworking arrangements will be on a trial basis for the first three months and may be discontinued at any time, at the request of either the teleworker or [Company Name]. If a teleworking arrangement is discontinued by [Company Name], every effort will be made to provide notice to the employee. However, there may be instances where no notice is possible. Likewise, if an employee elects to discontinue a teleworking arrangement, the employee should provide notice to his/her supervisor.

Employees that are teleworking at the time this policy is adopted will be permitted to continue teleworking. Existing teleworkers will need to sign the Teleworking Agreement and complete the associated documentation that is required of all teleworkers.

Income Tax

It will be the teleworker's responsibility to determine any income tax implications of maintaining a home office area. The company will not provide tax guidance nor will the company assume any additional tax liabilities. Employees are encouraged to consult with a qualified tax professional to discuss income tax implications.

Evaluation

Teleworkers agree to participate in all studies, surveys, training, inquiries, reports and analyses relating to this program.

Sample Teleworker Selection Survey for Employees

Telework is a workplace strategy that can involve working from home or another location on a full- or part-time basis. Teleworking can be a productive scheduling practice for many employees although it may not be feasible for employees whose job duties and home environment may not be conducive to working away from the office. Teleworking arrangements are successful when an employee's work responsibilities and personal work style is well matched with working away from the office.

This questionnaire provides an opportunity to consider whether teleworking will be an effective tool for meeting organizational and personal objectives. Responses to this questionnaire will help you and your supervisor to assess if teleworking can work for <Company Name> and you.

This questionnaire must be completed by each person interested in participating in the teleworking program.

Teleworking Screening Survey for Employees

Name: _____ Supervisor: _____
Classification: _____ Department: _____

1. Please describe your current job tasks.

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

Existing Work Characteristics

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

- _____ Amount of face-to-face contact required
- _____ Degree of telephone communications required
- _____ Autonomy of operation
- _____ Ability to control and schedule work flow
- _____ Amount of in-office reference material required

Future Work as a Teleworker

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

- _____ Amount of face-to-face contact required
- _____ Degree of telephone communications required
- _____ Autonomy of operation
- _____ Ability to control and schedule work flow
- _____ Amount of in-office reference material required

Employee Characteristics

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

- _____ Need for supervision, frequent feedback
- _____ Importance of co-workers' input to work function
- _____ Disciplined regarding work
- _____ Desire/need to be around people
- _____ Potential friction at home if teleworking (e.g. interruptions due to caring for sick child or spouse)
- _____ Level of job knowledge
- _____ Quality of work

3. Considering the nature of your job, how much would you want to telework? (Choose one)

- | | |
|---|---|
| <input type="checkbox"/> (a) About once every 2 weeks | <input type="checkbox"/> (d) Three days a week |
| <input type="checkbox"/> (b) About once a week | <input type="checkbox"/> (e) Occasionally for a special project |
| <input type="checkbox"/> (c) Two days a week | <input type="checkbox"/> (f) Other: _____ |

4. What kinds of work would you expect to do while teleworking? (Choose as many as apply)

- | | |
|---|---|
| <input type="checkbox"/> (a) Writing/typing | <input type="checkbox"/> (f) Research |
| <input type="checkbox"/> (b) Planning | <input type="checkbox"/> (g) Sales calls |
| <input type="checkbox"/> (c) Data management | <input type="checkbox"/> (h) Preparing reports |
| <input type="checkbox"/> (d) Administrative | <input type="checkbox"/> (i) Field visits |
| <input type="checkbox"/> (e) Reading | <input type="checkbox"/> (j) Other (please specify) |
| <input type="checkbox"/> (k) Computer programming | _____ |

5. Given the amount of teleworking you want to do, and the kinds of work you would do while teleworking, what equipment/services would you need, and which of those do you currently have? (Check appropriate box)

	Need	Have
Computer/terminal	<input type="checkbox"/>	<input type="checkbox"/>
Printer	<input type="checkbox"/>	<input type="checkbox"/>
High speed internet	<input type="checkbox"/>	<input type="checkbox"/>
Desk, filing space, other furniture	<input type="checkbox"/>	<input type="checkbox"/>
More than one phone line	<input type="checkbox"/>	<input type="checkbox"/>
Cellphone	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify) _____	<input type="checkbox"/>	<input type="checkbox"/>

6. Do you have adequate space in your home to dedicate to working?

- (a) Yes (b) No

7. Are there any distractions/obligations that will make working at home difficult or impossible?

- (a) Yes (b) No

Sample Teleworker Selection Survey for Supervisors

Teleworking is a workplace strategy that involves working from home or another location, on a full or part-time basis. Every supervisor/manager must fill out a questionnaire on their employees who are interested in teleworking.

Name: _____

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

1. Is the work done by any of your staff as it currently exists or with modifications suitable for teleworking, at least part of the time?

- (a) Yes
- (b) No Please explain why. _____

If your answer was "no," this completes the survey for you. Thanks!

2. Please describe the kind of work your employees do.

3. The rest of the survey should be completed for each of your employees who are interested in participating in the teleworking program. Some questions, such as those dealing with your management style, will probably have the same answers for each employee. Please rate each characteristic as high (H), medium (M), or low (L) by placing the appropriate letter in each blank. Some questions, however, will inevitably have different answers for different employees. Please duplicate this form for each employee.

Existing Work Characteristics

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

- _____ Amount of face-to-face contact required
- _____ Degree of telephone communications required
- _____ Autonomy of operation
- _____ Ability to control and schedule work flow
- _____ Amount of in-office reference material required

Future Work as a Teleworker

Please rate the following job characteristics for your employee in terms of his/her adaptability to teleworking.

- Amount of face-to-face contact required
- Degree of telephone communications required
- Autonomy of operation
- Ability to control and schedule work flow
- Amount of in-office reference material required

Employee Characteristics

Please rate the following according to your employee's characteristics.

- Need for supervision, frequent feedback
- Importance of co-workers' input to work function
- Discipline regarding work
- Desire/need to be around people
- Potential friction at home if teleworking (e.g. interruptions due to caring for sick child or spouse)
- Level of job knowledge
- Quality of work

Supervisor Characteristics

Based on your attitude towards teleworking and work style, please rate the following.

- Positive attitude toward teleworking
- Trust employee's ability to telework
- Ability to establish clear objectives
- Ability to communicate with employees

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

5. Considering the nature of your employee's jobs, how much would you want him/her to telework?

(Choose one only)

- | | |
|---|---|
| <input type="checkbox"/> (a) About once every 2 weeks | <input type="checkbox"/> (d) Three days a week |
| <input type="checkbox"/> (b) About once a week | <input type="checkbox"/> (e) Occasionally for a special project |
| <input type="checkbox"/> (c) Two days a week | |

6. What kinds of work would you expect him/her to do while teleworking? (Choose all that apply)

- | | |
|---|---|
| <input type="checkbox"/> (a) Writing/typing | <input type="checkbox"/> (f) Research |
| <input type="checkbox"/> (b) Planning | <input type="checkbox"/> (g) Sales calls |
| <input type="checkbox"/> (c) Data management | <input type="checkbox"/> (h) Preparing reports |
| <input type="checkbox"/> (d) Administrative | <input type="checkbox"/> (i) Field visits |
| <input type="checkbox"/> (e) Reading | <input type="checkbox"/> (j) Other (please specify) |
| <input type="checkbox"/> (k) Computer programming | |

[Type your company name here]

Sample Teleworker Agreement Form

[Type employee name here]

Edit this form to fit your telework program.

Find and replace [Company name] with your company's name. Customize placeholder items to suit.

Employee agrees to perform services for Employer as a "teleworker." This agreement spells out the basic terms and conditions under which [Employee name] (hereafter "Teleworker") will be teleworking for [Company name] (hereafter "Employer").

This agreement is effective [month] [XX], 20[XX], and remains in effect [month] [XX], 20[XX], while [Employee name] teleworks and is employed by Employer, unless the agreement is terminated earlier.

Teleworking is available only to eligible employees and is offered at Employer's sole discretion. Teleworking is not available to the entire organization. As such, no employee is entitled or guaranteed the opportunity to telework.

Termination of Agreement. Either party may terminate Teleworker's participation in the program, with or without cause, upon reasonable notice in writing to the other party. Employer will not be held responsible for costs, damages or losses resulting from terminating this teleworking program. This Agreement is not a contract of employment and shall not be construed as such.

Salary, Job Responsibilities, Benefits. Teleworker agrees to comply with all existing job requirements as are in effect in the office. Salary and benefits will not change because of involvement in this telework program. Specific job responsibilities may only be modified with the agreement of Teleworker's supervisor.

Work hours, Overtime, Vacation. Work hours are not expected to change during the program. In the event that overtime is anticipated, it must be discussed and approved in advance with the Teleworker's manager, just as any overtime scheduling would normally be approved.

Work Schedule. The daily work schedule for the days when working remotely or at home is subject to approval by Teleworker's manager. The manager may require that Teleworker work certain "core hours" and be accessible by telephone or otherwise during those hours.

Equipment. Teleworker must have all necessary equipment in a suitable home or remote office location to do their jobs. Employer may elect to provide computer, software, and other equipment needed for teleworking. If the Employer provides such property or equipment, these items remain the property of the Employer and must be returned to the company upon request. Any computer, software, or other equipment or supplies provided by Employer are provided for the sole use of the Teleworker to perform their jobs.

Employer-owned software may not be duplicated except as formally authorized. Employer will be responsible for insurance and maintenance of all company-provided equipment.

Teleworker may use personal equipment for teleworking purposes. In such cases, Teleworker will be responsible for the maintenance and insurance required for such equipment.

Workspace. Teleworker agrees to designate a workspace within their remote work location that is quiet and free from interruption, and for placement and installation of equipment to be used while teleworking. Teleworker agrees to maintain this workspace in a safe condition, free from hazards and other dangers to Teleworker and equipment. Employer may approve the site chosen as Teleworker's remote workspace. If requested, Teleworker shall submit photos of the home workspace to their manager prior to commencing teleworking.

Teleworker agrees that Employer can make on-site visits (with advance notice) to the remote work location for the purpose of determining that the site is suitable for telework, safe and free from hazards, and to maintain, repair, inspect, or retrieve employer-owned equipment, software, data or supplies. In the event the Teleworker fails to return employer-owned property or equipment upon demand, and legal action is required to regain possession of this property or equipment, Teleworker agrees to pay all costs incurred by Employer, including attorney's fees, should Employer prevail.

Any Employer-owned or provided materials taken home or to the remote work location should be kept in the designated work area and not made accessible to others.

Office Supplies. Office supplies will be provided by Employer as needed. Teleworker's out-of-pocket expenses for other supplies will not be reimbursed except with prior approval of Teleworker's manager.

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

Dependent Care. Teleworking is not a substitute for dependent care. Teleworker will not be available during company core hours to provide dependent care or supervision.

Income Tax. It will be the Teleworker's responsibility to determine any income tax implications of maintaining a home office area. Employer will not provide tax guidance nor will Employer assume any additional tax liabilities. Teleworkers are encouraged to consult with a qualified tax professional to discuss any income tax implications.

Evaluation. Teleworkers are required to participate in any employer studies, surveys, training, inquiries, reports and analyses relating to this telework program.

Teleworker remains obligated to comply with all of Employer's rules, practices, instructions and this Agreement. Teleworker understands that violation of any of the above may result in terminating this arrangement.

Name of Teleworker: _____

Conditions for teleworking agreed upon by the teleworker and his/her supervisor:

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

2. The employee will telework _____ days per week.

3. The employee's work hours will be from _____ a.m. to _____ p.m.

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

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

6. The employee agrees to call the central office to get his/her messages at least _____ times per day.

7. The employee agrees to check and respond to e-mail messages at least _____ times per day.

8. The employee agrees to get all supplies needed for teleworking from the company office. Reimbursement for out-of-pocket expenses for supplies will need prior supervisory approval.

9. Additional conditions agreed upon by the telemanager and teleworker are as follows:

I have reviewed the teleworker agreement with _____ prior to his/her participation in the company's teleworking program.

Date

Supervisor Name

Signature

The above material has been discussed with me.

Date

Employee Name

Signature

I have read and understand this agreement and accept its conditions.

Employee name ("Teleworker")

Date

I have reviewed the terms of this agreement with _____ (Employee name)

Supervisor name

Date