

# Workflex and Telework Guide

*Everyone's Guide to  
Working Anywhere*



by KENNETH MATOS

WHEN

WORK

WORKS



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## INTRODUCTION

We created the *Workflex and Telework Guide: Everyone's Guide to Working Anywhere* to help you and your colleagues strategize around how to reinvent work to get the most from your telework opportunities. This Guide is divided into three sections:

### SECTION 1: Tips for HR Professionals

### SECTION 2: Tips for Managers of Teleworkers

### SECTION 3: Tips for Teleworkers

Each section is designed to be a stand-alone Guide to telework for each of the different stakeholders charged with making it work. Since no two workplaces are exactly alike, all of the tips can and should be adjusted to match the particulars of your telework environment and workforce. Use the ideas and questions listed in the Guide to get people thinking and talking about how they can best contribute to a successful telework experience for their organization, co-workers and themselves.

The power of telework to retain and grow successful employees is best seen in the lives of employees like Sarah.<sup>1</sup> In 2004, Sarah started as an intern at **BDO**, an international accountancy firm; and over the next nine years, Sarah has risen to become a Senior Manager, providing her talents to advance BDO and its clients. During that time, telework was essential to her success. Telework helped her relocate to an office in a new city where BDO needed her talents. Later, it allowed her and her husband to relocate to the city where they felt they could best offer those talents to their growing family and maintain their careers at BDO. When her son was born 15 weeks early and required five months of hospitalization after his birth, telework allowed Sarah to seamlessly work from the hospital between feeding and bonding times throughout the day and then take maternity leave when her son came home. Today, Sarah manages a dispersed team of teleworkers and multi-site employees applying the leadership skills she learned as a remote worker. There were several places in her career where telework was instrumental in her success both on and off the job, and she, her family, her managers and BDO all thrived because of it.

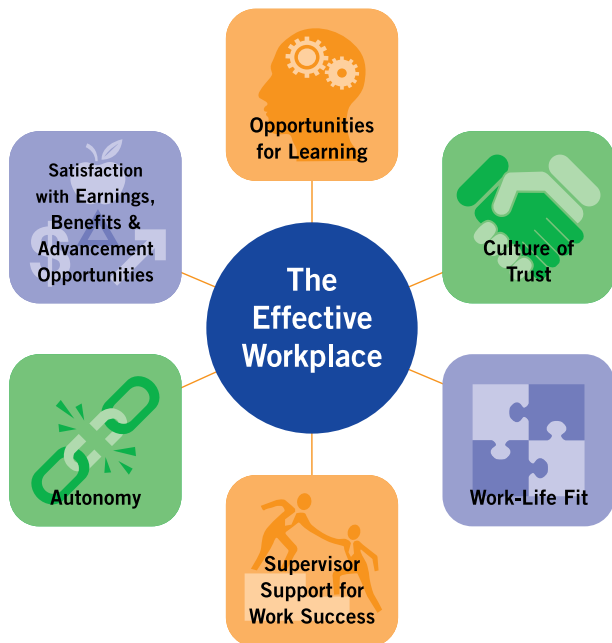
As Sarah's story shows, telework is an opportunity for individuals and organizations to transcend the limits of real estate and commuting times and gain a level of control over how, where and when they work throughout their lifecycles. Though not all jobs are compatible with all types of telework, when used properly, telework can be a powerful tool to advance and retain the talent that employers need to stay at the forefront of their industries, enable managers to use that talent to best effect and empower employees to stay on top of multiple priorities without letting distance be an insurmountable obstacle.



## WHAT IS AN EFFECTIVE WORKPLACE?

Effective workplaces recognize that employees are an organization's greatest resource and make a critical difference in the organization's ability to not merely survive, but to thrive. To be truly effective, a workplace—its design, practices and policies—must benefit both the organization and its employees.

Since 2002, Families and Work Institute (FWI) has engaged in a research journey to define the elements that make up effective workplaces. Based on our 2008 National Study of the Changing Workforce data, we have identified six criteria of effective workplaces, all of which benefit both the employee and the organization.



### Effective Workplaces are associated with better *Employee Outcomes*:

- Employee engagement
- Job satisfaction
- Turnover intention

### Effective Workplaces are linked to better *Health and Well-Being Outcomes* like:

- Overall health
- Frequency of minor health problems
- Indicators of depression
- General stress level
- Frequency of sleep problems

### Opportunities for Learning

A job where the meaning and importance of the work is clear; that encourages learning and creativity; and has enough task variety to keep you interested.

### Culture of Trust

A workplace culture where supervisors are trustworthy, ethical, and seek your input to improve performance.

### Work-Life Fit

Having the support, schedule and flexibility you need at work in order to effectively manage your work and personal/family responsibilities. This includes options like telework and self-scheduled shifts.

### Supervisor Support for Work Success

Supervisors who provide you with honest and relevant information needed to do your job well and who recognize you when you a job is well done.

### Satisfaction with Earnings, Benefits & Advancement Opportunities

Having reasonable benefits and earnings for your job and adequate opportunities for advancement.

### Autonomy

The ability to decide or have input into what your job entails, how it is done, and to be true to yourself while doing it.

# Section 1

## *Tips for HR Professionals*



**H**uman Resources (HR) professionals have two primary roles with regard to telework. The first is to determine whether telework can help make work “work” for all involved and, if so, to build a business case for using it. The second is to develop policies that ensure employees can maximize their success on and off the job while keeping the organization clear of any liability issues. The following list of tips provides suggestions for developing a business case and crafting your telework policy.

### Developing a Business Case

#### **Determine whether there is a need for telework and, if so, what that need is.**

The need may come from the organization’s desire to reduce its real estate footprint and/or costs, improve recruitment and/or retention or reduce absenteeism. The need may come from a community that wants to improve traffic congestion or air quality by reducing the number of commuters on the road. The need may come from employees who want to reduce the time or cost of commuting or to better manage personal or family responsibilities, while being productive at work. At its best, telework solves multiple problems for varied stakeholders.

#### **Outline the benefits of the business case.**

The business case is the rationale for offering telework that details how the benefits of providing it outweigh any costs of doing so. It is often best to put the business case in the words of influential people at your organization. Focus on things that managers and senior leaders have said are important to them and the business strategy. For example, if absenteeism is a problem, your business case will gather more supporters if it focuses on how telework might reduce absenteeism than how it will help with recruitment or stress. Also, consider whether stakeholders will be moved by employee issues (e.g., stress), business issues (e.g., recruitment), community issues (e.g., effects on local traffic) or some combination of the three.

#### **Identify telework challenges.**

The business case not only identifies the opportunities offered by telework, but also spells out the “costs” or challenges of providing telework and how they can be addressed. Be honest with yourself and others about what problems may arise. Reasonable expectations will result in a more sustainable program than unrealistic goals that can’t be achieved. Engage those who are questioning telework in the design process and push them to give ideas on how it could work — not, just why it won’t be easy. Below is a list of objections reframed as questions you can pose to those raising doubts to get them considering how telework could work.



Objection	Response
The jobs here aren't designed for telework.	How can job descriptions be designed so employees have enough independence to work remotely?
Telework just doesn't mesh with our culture at this organization.	What are the ways in which our culture blocks flexibility and telework, and how can we make it more accepting of different ways of working?
Employees need to have face time with the boss/senior leaders/clients to get ahead.	What suggestions do you have on how we deemphasize face time and centralized control towards measurable productivity and employee development?
We don't have the technology to telework.	What technology, if any, is needed to support broad access to telework?
Managers aren't prepared to lead remote employees and/or teams.	How can managers be best prepared to lead remote employees and/or teams?
We need to have people here to collaborate and work together.	Are there times when employees are not collaborating that they could telework?  Are there ways of collaborating we already use when employees are in different worksites/offices that we could use for teleworkers?
Things won't work if no one is ever in the same place.	There are many forms and degrees of telework. Is there a level of telework that you would be willing to try out for a limited time?

### Define the types of telework that you are considering.

There are a number of different terms used to describe “telework,” which vary in terms of the frequency and location in which work will actually take place. It’s important to agree on terminology for your organization, so stakeholders have no doubt about what your organization’s telework will look like. If a manager thinks telework means 100% offsite and the employee only wants one day a week, there are bound to be a few awkward conversations. Try using the following terms to start, and then adjust to fit your organization’s culture.

#### General Terms

- *Telework or remote work:* Any situation where an employee works in a location that is not owned or maintained by the employer
- *Working onsite:* Any amount of time spent working at a location that is owned or maintained by the employer

#### Frequency Terms

- *Full-time telework or telecommuting:* Where an employee rarely, if ever, works onsite; may be from any location

- *Regular telework*: Where an employee has a consistent mix of telework and working onsite (e.g., teleworking one day a week and onsite four days a week); may be from any location
- *Occasional telework*: Situational, where an employee always works onsite except during emergencies or other specific employer-approved situations; may be from any location

### Location Terms

- *Working from home*: Any frequency of telework that occurs in the employee's home or other employee-chosen location close to home (e.g., coffee shop, park, library)
- *Working at a hub*: Any location where employees gather to work away from their homes or primary office spaces; these co-working sites may be maintained by an employer or by a third party provider
- *Working on the road*: Any frequency of telework that occurs in transit (e.g., on a plane, train or automobile) or a temporary residence (e.g., hotel or motel); includes work done while traveling for business (e.g., a client visit) or personal reasons (e.g., working during the days while on vacation in another place)
- *Working at client site*: Any frequency of telework that occurs at a worksite owned or maintained by a client or customer

### Provide a mix of stories and numbers in your proposals.

You'll find that different stakeholders will be motivated by different arguments. Some need to see rigorous, hard numbers. Others want stories and examples from respected employees. Varying the types of techniques you use will recruit the most supporters. Stories should be gathered from your employees. Tap leaders, managers or other well-respected employees to share their experiences around how telework has or could help them or their teams be more successful and engaged. Appendix A contains a listing of several useful statistics and case studies you may want to include in a business case for your organization.

### If there is reluctance to change overall policy, consider a pilot.

A pilot can provide an opportunity to assess benefits and problems and make adjustments before establishing a more general telework program. It also gives you an opportunity to develop and test your assessment process for showing what is and isn't effective before you launch the full program.

### Plan on how to measure effectiveness early.

Before you launch the program, make sure you have clearly articulated goals for telework and a plan on how to measure whether those goals have been met. Consider the use of pilot studies and comparison groups where some get to telework and some do not. Though some basic steps are presented in the section below entitled "How can I assess whether a telework program is working?" a detailed examination of how to build metrics for any HR program, including telework, is available in [Workflex: The Essential Guide to Effective and Flexible Workplaces](#).

### Identify examples of success.

Many companies have already started the integration of telework into their policies and work processes and can serve as examples of how to make telework work. A good number of winners of the When Work Works Award presented by Families and Work Institute (FWI) and the Society for Human Resource Management (SHRM) have examples of successful telework programs. You can identify winners that use telework in various locations and industries via the Guide to Bold New Ideas — a free, searchable, online database available at <http://www.whenworkworks.org/search-recipients>. Alternatively, you can reach out to a When Work Works Community partner for advice and referrals in your local community. A listing of community partners and their contact information is available at <http://www.whenworkworks.org/community-partners-list>.

### Consider manager training.

For many managers, telework requires a different set of skills than they've honed over their careers, and they may be reluctant to participate for fear of not being ready for the change. Consider offering training to managers on how to manage a dispersed workforce — a necessary skill for senior managers who must routinely lead people they don't see on a regular basis, especially in larger organizations. Emphasize that the training is for a new, advanced skill for the new, digital workplace — not a remedial course.

### Crafting Your Telework Policy

Once you have convinced decision makers to embrace — or at least experiment with — telework, you will need to define the organization's policies towards telework. Your telework policies outline specific standards for how telework will be conducted at your organization and should ensure compliance with all relevant federal, state and local laws. There are five essential questions HR professionals should consider when developing the policies for their organization.

- ✓ Who can telework, and how much?
- ✓ How should employees apply for — or be asked to — telework?
- ✓ How can I assess whether a telework program is working?
- ✓ How can any telework problems be resolved?
- ✓ What are the baseline policies and legal issues to consider?

The following tips are designed to help you determine the answers to these questions are for your organization.

### Who can telework, and how much?

#### *Processes for deciding who can telework should be focused on jobs.*

Overall eligibility for telework should be based on whether a particular job can be done offsite, and that process should be as transparent as possible. Basing telework eligibility on job tasks rather than personal characteristics and performance has two major advantages:

- 1) It reduces the chances that managers will grant access unevenly and your resulting vulnerability to claims of unequal treatment.
- 2) It allows you to use telework as a performance improvement tool for employees who need flexibility to be successful.

When crafting job descriptions, identify tasks that the average employee can do remotely. If a job description includes tasks that can be done remotely, consider offering the option to complete *those* tasks remotely to all employees in those jobs. For some jobs, this will mean just a few hours of telework eligibility, while others may work remotely for one or more days. Though it may not seem worth the effort to grant an employee a few hours of telework, a few hours of location flexibility can be a big deal in certain situations.

**Allowing employees access to telework based on their job descriptions is not the same as allowing them to all telework or to telework at the same time or in the same way.**

Make sure the process and criteria (e.g., a list of sample factors to be considered) for determining which job tasks are telework eligible are written down and applied consistently. There should also be fair and equitable processes in place to determine whether an employee is succeeding in using telework.

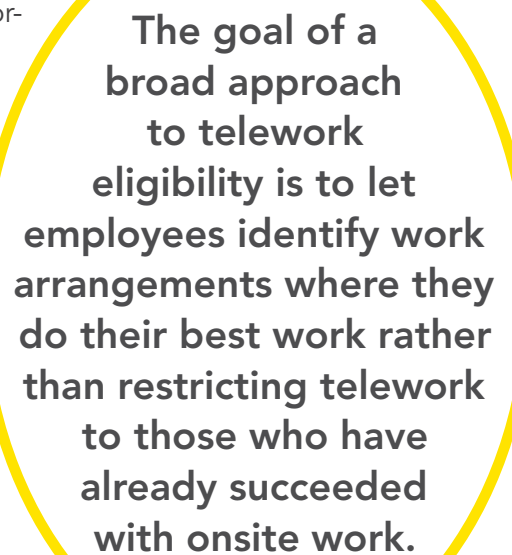
Allowing employees access to telework based on their job descriptions is not the same as allowing them to all telework or to telework at the same time or in the same way. If onsite coverage is necessary for specific jobs, then managers and employees need to set up telework schedules that make sense for the business. Perhaps employees will alternate their telework days or some will telework in the morning and others in the afternoon. The manager may need to work with employees to set up a system for determining how schedule conflicts will be resolved. For example, if two employees want to telework when one of them needs to be onsite, will you use seniority, reason for telework, a mutual decision-making process or some other system to make determinations? Teleworking employees with poor performance may need to be counseled to better performance, a return to onsite work or out of the organization. The goal of a broad approach to telework eligibility is to let employees identify work arrangements where they do their best work rather than restricting telework to those who have already succeeded with onsite work.

### *Teleworker or telecommuter?*

Deciding whether a position can function as a full-time remote position can be a complex task. In general, telecommuting and teleworking positions have the same characteristics, but telecommuting positions have a greater degree of those characteristics. Four of the most essential characteristics to consider are:

- 1) Do job tasks require onsite only resources?** In other words, can the job be done at a remote computer or workspace?
- 2) Is walk-in customer service a primary responsibility?** Is the employee required onsite to deal with unscheduled, onsite appearances by clients or management?
- 3) Does the employee have sufficient independent access to information?** Can the employee get or request essential information, including feedback on their performance, when they need it?
- 4) Does the position have sufficient autonomy to work remotely?** In other words, are employees trusted with the responsibility to make day-to-day work decisions without frequent check-ins with onsite management?

There is no clear rule on how much of each of these characteristics is required to draw the distinction between telework and telecommuting. It is okay to experiment and see what options work and how to tailor them to specific jobs and employees, so that they work for everyone, including the employer. Just make sure everyone involved understands the experimental nature of the process and that experiments can be terminated at any time for the good of the business.



**The goal of a broad approach to telework eligibility is to let employees identify work arrangements where they do their best work rather than restricting telework to those who have already succeeded with onsite work.**

### *Change at a pace that makes sense for your organization and workforce.*

For some organizations, this broad approach to telework is too much of a good thing, too soon. It's okay to go with a more limited start to telework. A couple of things that can make telework feel more manageable to all involved are:

- stating explicitly that arrangements are considered on a case-by-case and individualized basis;
- stating explicitly that the organization reserves the right to discontinue telework arrangements at its discretion;
- maintaining a standard timeline for ongoing reviews of telework arrangements where changes can be made for the benefit of all involved;

- pilot programs or test periods with defined end dates, benchmarks for success and the option to renew if all parties agree and the benchmarks are achieved;
- restricting telework to certain days, tasks or meetings where everyone is comfortable with telework; or
- requiring full-time teleworkers to work onsite for a period of time to form essential relationships, learn how the organization functions, or for other specific business reasons.

Remember that test periods enhance performance when they are based on establishing a baseline for an employee's skills, relationships or knowledge. Test periods without such specific measurable goals just serve to redefine telework as a perk that has to be earned rather than a business strategy to be used as needed to maximize performance.

There are many options for setting a comfortable pace for an evolution towards telework, and managers may need to be reminded that they have the right and responsibility to make sure telework is executed in a way that works best for all stakeholders. Managers and employees may also benefit from a clear message that eligibility for telework does not equal a right to telework on demand without open and consistent coordination, accountability and measurable outcomes.

### **How should employees apply for — or be asked to — telework?**

#### ***Submitting a telework request***

Employees who are interested in telework will need a clear process by which they can make a request for telework. This can be as simple as speaking to their manager or as complex as filing a formal request with the HR department, depending on your organization's culture and policies. Whatever process is used, it is essential that the process be openly communicated early, so that employees know the right way to make a request before any emergency situations emerge.

Allowing managers to receive requests directly and make decisions in the moment is a reasonable choice for simple, short-term requests, as long as the guidelines for granting telework are well documented and managers have been appropriately informed of those guidelines. For more significant requests, it may be helpful to involve HR, if only to ensure that access to telework is being administered fairly and in accordance with organizational policies. It is also helpful for employees to have an additional contact around telework and other workplace flexibility options, in case they feel that their manager is being unfair or inconsistent.

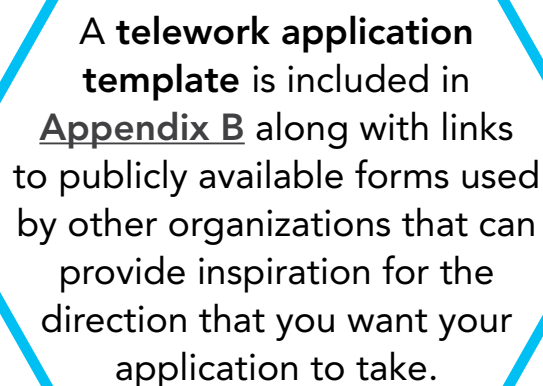
#### ***Informal or formal telework arrangements***

*Informal telework* enrollment generally doesn't include any written agreement and is often an ad hoc response to specific situations. It is best for one-time circumstances of telework (e.g., waiting for a delivery or repairs) where telework is a way to maintain production when an

employee would otherwise have to take a vacation or personal day. To keep informal telework arrangements successful, managers and employees should reach a mutual understanding of the appropriate frequency, communication methods and any other requirements in advance, and there should be transparency around the process, so that other employees understand that these informal arrangements are equitable.

*Formal telework* requires that employees go through a written process to declare their intention to telework and negotiate the terms that make the most sense given their job tasks and connections to other employees. Formal arrangements are best for ongoing telework situations (e.g., work from home once per week), so that employees and managers have time to think about how telework can be best managed given the tasks involved.

There should be a standard procedure for enrolling and withdrawing from telework arrangements, general time frames by which employees can expect to have their requests reviewed and appeal procedures for employees who are denied teleworking arrangements. There should also be descriptions of the kinds of situations in which a manager can require employees to work onsite, such as for important meetings, client visits or other special circumstances, despite active enrollment in a telework situation. Your procedure should also articulate how expectations around productivity, schedules and availability will be set — to give the process consistency and avoid future problems. Not every telework agreement needs to be the same, but they should all follow the standards set out in your telework policies and be consistent with the organization's stated intentions regarding telework.



**A telework application template is included in Appendix B along with links to publicly available forms used by other organizations that can provide inspiration for the direction that you want your application to take.**

### ***Requests by employers for employees to telework***

A new development since the start of telework is the growing number of employers who request or even require some or all of their employees to telework. This can take a number of different forms with employees working from home, client locations or on the road instead of onsite. Many employers choose to pursue a remote workforce to reduce real estate costs incurred by providing a central location that can house all their employees on a daily basis, especially during periods of rapid growth. Generally, some employees will work at the central office full time while others will work remotely a few days a week, and others may be full-time teleworkers.

Though many employees do prefer to telework, many others do not; and telework programs that require telework can be frustrating to employees who have found success working onsite.



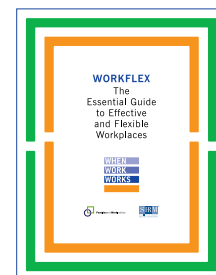
While this use of telework is a legitimate business strategy, employers may want to phase in required telework, providing employees with training and virtual networks to help take the place of the onsite environment. It is also important to provide employees as much control over the process as can be allowed. For example, if some employees will still be working onsite, let them self-select into the onsite and offsite groups before making any final assignments. It would also be helpful to provide employees the opportunity to (re)negotiate their telework days with coworkers (with appropriate guidelines for onsite coverage) and their managers. This will help them have a sense of ownership of their schedules and workspaces even if they don't end up with their first choice.

### How can I assess whether a telework program is working?

While managers are responsible for assessing the performance of individual teleworking employees (as described in [Section 2: Tips for Managers of Teleworkers](#)), HR professionals are required to assess whether the program as a whole is successful. Assessing the effectiveness of a telework program is no different than assessing the results of any other workforce program and follows five broad steps. It is best to follow these steps in order, but if you already have a telework program in place, you can still use this process to plot out how you will assess your program going forward.

- 1) Define the goals.** Assessment of any process always begins with a detailed description of the results that you hope to achieve through that process. These goals should align with your business case for telework. Some example goals are lower absenteeism, higher employee morale, greater productivity and fewer errors.
- 2) Determine the metrics to demonstrate goal achievement.** Metrics are the specific data you will measure and report to show that goals have been achieved. Some metrics may already be calculated by your organization (like absenteeism) and should be used as part of your assessment. Other metrics may be felt intuitively (e.g., low employee morale), but may lack specific metrics to demonstrate change (e.g., employee attitude surveys). Try not to wait until you are in the midst of telework before defining the metrics, as you may find that some metrics are too costly or complicated to calculate after the fact.
- 3) Determine your benchmarks.** Once you have your metrics, you will need to determine benchmarks to which you can compare the results. For example, a single employee survey may tell you that morale is a seven out of 10. By itself, that number doesn't tell you if things are as good or as bad as they could be or if things are getting better or worse. Most metrics

A more detailed description of the assessment process is available in [Workflex: The Essential Guide to Effective and Flexible Workplaces](#).





require a benchmark to compare to in order to have real meaning. You can determine your benchmarks by:

- ✓ comparing your organization to similar organizations;
- ✓ checking your metric at the start, several pre-determined points during, and at the end of an evaluation period; and/or
- ✓ choosing an ideal to which you can aspire.

Note that almost no metric worth measuring stays at the highest level on a regular basis — measuring a constant is a waste of resources — so benchmarks that require you to regularly get perfect scores (e.g., 10 out of 10) are not helpful. You may also need to adjust your benchmarks up or down once you have seen the results of a few assessments. That is perfectly normal, and it may take a little trial and error to calibrate the right short- and long-term benchmarks for your organization.

#### 4) Confirm that stakeholders agree with the assessment

**plan.** Even if you have crafted the perfect assessment plan, that is no guarantee that stakeholders will acknowledge its accuracy or relevance. Make sure that they buy into the connection that your metrics have to the reality on the ground and their own efforts. Ask what metrics they would find convincing and focus on metrics that are of use to you and your stakeholders. Collecting metrics that have no relevance to how people are making decisions is a waste of resources even if those metrics say positive things about the organization and your telework program.

**Telework is a tool to be used strategically for the benefit of employer and employee, not a perk to be earned by employees that have already succeeded without that tool.**

- #### 5) Check and report your results, and repeat.
- Once an evaluation period ends, remind stakeholders of the goals you set out to achieve and the process of collaboration used to assemble the assessment plan. Then, present your results and ask for their feedback. Have you measured everything that needs to be assessed about the program? Are the results satisfactory? How can the stakeholders contribute to improvement? Are there changes to the telework program that would help improve things even further? Once you have their feedback, you can begin another assessment period with updated goals, metrics and benchmarks.

#### How can any telework problems be resolved?

Although telework has great potential for creating new and more effective ways of working, it does not come without its complications, and not all telework scenarios will work smoothly from the start. The following tips outline some best practices and perspectives for avoiding or resolving problems that may arise in your telework arrangements.

### *Establish a positive culture around telework.*

It is not enough to have policies that allow telework. Organizations that use telework successfully also make an ongoing and explicit effort to create a culture where this way of working is valued and where employees who work remotely are not jeopardized or seen as less committed to the organization. You can promote this culture by publicly sharing stories of successful employees who telework and by creating a process whereby employees can have access to a problem-solving process (such as an ombudsman) to address issues when they feel that they are being considered less valued simply because they telework. Build a coalition of supportive individuals who can reinforce the philosophy that telework is a tool to be used strategically for the benefit of employer and employee, not a perk to be earned by employees that have already succeeded without that tool.

### *Focus on maintaining equity, not equality, among employees.*

Sometimes employees see differences in how they are treated as a sign of unfairness. They may believe that all employees should be treated in the same way. If employees begin asking such questions, you may find it helpful to emphasize the difference between equity and equality. In the case of workflex, *equity* means that employees receive access based on whether their specific job requirements are compatible with telework. This differs from *equality*, where everyone has the exact same level of access to telework regardless of what they do. Emphasizing equity allows for tailored arrangements that can adapt to differences in personal and organizational circumstances over time. Equality is an all or nothing gamble that more often than not will result in no one being able to telework.

The job task centered approach to telework eligibility described previously in the tip **“Processes for deciding who can telework should be focused on jobs”** helps maximize equity and makes it easier to explain why people have certain options available to them based on what they do. This method gives employees clear guidelines about how much telework access to expect based on their jobs rather than their personal characteristics or their manager.

Make sure employees have access to telework program descriptions that include explicit statements around:

- your organization’s intent regarding the telework policies;
- how decisions about telework eligibility are made, and how conflicts between telework schedules will be adjudicated;
- your organization’s focus on an equitable workplace and the difference between equity and equality; and
- how telework is not a right or entitlement, and that, while some positions are conducive to certain telework arrangements, other positions simply are not.

Providing employees with this information upfront will create a foundation for constructive conversations and will support your position in any discrimination proceedings.

### *Be open to employees' questions about whether their jobs are telework (in)compatible.*

Engage employees in developing explanations of how the relevant job tasks can be completed and evaluated remotely. Use a pilot program to test their arguments, and apply the results of the pilot to all employees with the relevant job tasks. If a job is not telework compatible, shift the conversation to other forms of flexibility that would help them succeed.

### *Make fair decisions around performance.*

Employees' past job performance needs to figure into decisions about telework, but it is important that you consider whether telework may be a solution to poor performance. An employee whose work style may not seem compatible with working offsite may, in fact, flourish when a difficult commute or family issue is reduced. For this reason, trial periods with clear performance expectations are recommended.

### *Help managers stay focused on their core goals.*

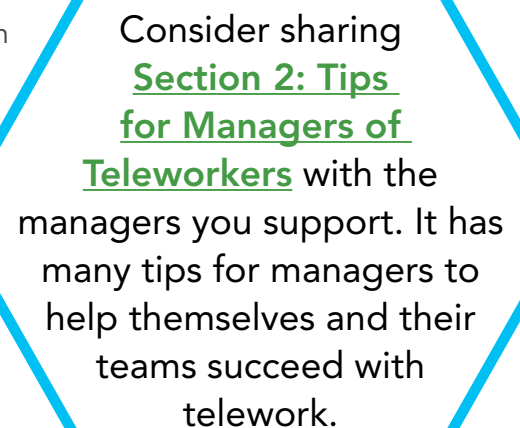
Some managers will want to deny telework options to employees who they judge to be easily distracted, who have trouble getting started or meeting deadlines. They may fear that such employees will not thrive in the highly independent environment of telework. Their concerns are valid, especially since they will be held responsible for managing any performance breakdowns. Yet, workplaces are also full of distractions, and being onsite does not necessarily equate to being focused or productive. For that reason, a simple "no telework" solution is not guaranteed to achieve the results they really want: a productive employee who doesn't consume too much of their time and energy.

If a manager wants to deny telework to an employee in a telework eligible job, ask the manager if forcing the employee onsite will improve productivity because:

- The onsite employee will eventually be able to self-manage his/her time and effort.
- The manager will be able to provide constant, direct oversight of the employee.

If the former is true, helping employees recognize where they do their best work and identifying other forms of flexibility that might meet their needs is preferable to simply denying access to telework. By working with employees, managers develop employees' abilities to self-manage, keep them engaged in long-term performance maintenance and reduce the likelihood of resistance to an enforced solution. Most importantly, it keeps the manager's time free from micro-managing the employee.

If the latter is true, the manager should consider whether it is worth bringing such employees back onsite if they will still be a significant drain on the manager's and/or team's resources.



Consider sharing **Section 2: Tips for Managers of Teleworkers** with the managers you support. It has many tips for managers to help themselves and their teams succeed with telework.

Such employees are better candidates for performance improvement plans and possible separation, wherever they work. Retention under more rigid circumstances may breed resentment and a downward performance spiral from both the employee and the manager who ends up wasting resources chasing after a non-performing employee.

### *Determine your policy toward telework and child care.*

Telework can be a great boon to parents by reducing commutes and providing some additional flexibility around managing work and care responsibilities. However, combining telework where the employee is also taking full responsibility for the care of children during working hours — especially for the care of infants and toddlers — is neither easy nor ideal. It is common practice to require that employees acquire regular child care arrangements when teleworking on a regular or full-time basis. On the other hand, there are situations where occasional telework is reasonably compatible with child care (for example, caring for a sick child where the employee can complete work requirements). Such a situation may be preferable to having an employee take a sick day, especially if there are important work deadlines that the employee can reasonably meet while caring for the child. However, the best approach would be to develop a reliable backup system where other employees can step in to keep projects on schedule while the employee takes time off to provide care.

**No matter where they work, employees are *always* responsible for their own performance and should be held accountable for their work. Allowing managers to confuse their responsibility to direct and develop employees with policing day-to-day behavior is of no benefit to anyone, least of all the employer.**

### *Consider the relationship between telework and flexible scheduling.*

Telework involves more than working offsite. Because employees teleworking from home typically don't have long commutes, they might start earlier or end later or work their full-time schedule intermittently over the course of a day or week. However, managers of teams without clear expectations around availability can become uncomfortable when employees combine telework and other ways of working flexibly. Be clear about your organization's minimum expectations for teleworkers' availability and their schedule flexibility. Do teleworkers need to keep to a set of core work hours or inform someone when they step away from work? Strongly encourage your managers to set explicit norms for availability and communication methods based on your organizational standards.

### What are the baseline policies and legal issues to consider?

Each organization will need to set its own standards for the form that it wants telework to take among its employees and managers. That means setting up standard policies that ensure productivity, cost efficiency, employee support and legal compliance. The following tips provide a checklist of essential considerations when developing the rules that will guide your organization's telework practices.

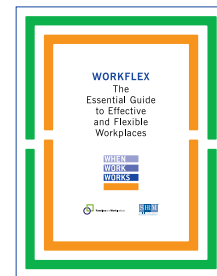
#### Workplace Safety Regulations

The Occupational Safety and Health Act (OSHA) of 1970 established workplace rules around workplace safety and the recording and reporting of occupational injuries and illnesses. From a telework perspective, this raises two issues that employers should consider:

**1) Home Inspections.** As of February 2000 ([Directive Number CPL 2-0.125](#)), OSHA has indicated that it has separate policies for home offices and other home-based worksites.

- **Home offices**, where office based tasks (e.g., filing, keyboarding reading, writing, etc.) are performed and relevant equipment is used (e.g., telephone, computer, filing cabinet, etc.)
  - ✓ Will not be inspected by OSHA.
  - ✓ Employers will not be held liable for employee's home offices nor for conducting inspections of employee's home offices.
  - ✓ OSHA will let any complainants know about their policies and may informally advise employers about complaints, but will not follow-up with employer or employee.
- **Other home based worksites**, where non-office work such as home manufacturing operations are conducted:
  - ✓ Will only be inspected when OSHA receives a complaint or referral indicating that a violation of a safety or health standard exists that threatens physical harm, or that an immediate danger exists, including reports of a work-related fatality.
  - ✓ The scope of the inspection will be limited to the employee's work activities. (The employee's home and furnishings will not be inspected.)

These legal tips are adapted from  
**Workflex: The Essential Guide to Effective and Flexible Workplaces.**



- ✓ Employers are responsible for hazards caused by materials, equipment or work processes which the employer provides or requires to be used in an employee's home.
- ✓ If a complaint or referral is received about hazards at an employee's home-based worksite, the policies and procedures for conducting inspections and responding to complaints as stated in [OSHA Instruction CPL 2.103](#) (the Field Inspection Reference Manual or FIRM) and [OSHA Instructions CPL 2.115](#) will be followed, except as noted by (Directive Number CPL 2-0.125).

**2) Recordkeeping and Reporting.** Employers that are required (because of their size or industry classification) by the OSH Act to keep records of work-related injuries and illnesses will continue to be responsible for keeping such records, regardless of whether the injuries occur in the factory, in a home office or elsewhere, as long as they are work-related and meet the recordability criteria of [29 CFR Part 1904](#).

Generally speaking, OSHA requires that employers record and report occupational injuries and illnesses. Federal regulations provide guidance on what constitutes "work-related-ness" for purposes of such injuries and illnesses [[29 C.F.R. § 1904.5\(b\)\(7\)](#) (7-1-11 ed.)] and explain how employers can decide whether a case is work-related when the employee is working at home.

- ✓ Injuries and illnesses that occur while an employee is working at home, including work in a home office, will be considered work-related if the injury or illness occurs while the employee is performing work for pay or compensation in the home, and the injury or illness is directly related to the performance of work rather than to the general home environment or setting. For example, if an employee drops a box of work documents and injures his/her foot, the case is considered work-related. If an employee's fingernail is punctured by a needle from a sewing machine used to perform garment work at home, becomes infected and requires medical treatment, the injury is considered work-related. If an employee is injured because he/she trips on the family dog while rushing to answer a work phone call, the case is not considered work-related. If an employee working at home is electrocuted because of faulty home wiring, the injury is not considered work-related.

### ***Workers' Compensation Regulations***

Workers' compensation laws provide medical and disability benefits to employees for lost wages caused by occupational injuries and diseases arising out of and in the course and scope of employment. Although there are federal workers' compensation laws, the vast majority of workers' compensation laws are state based. Many such state workers' compensation laws are an employee's exclusive remedy for work-related injuries or diseases (save in cases of intentional employer misconduct). Generally speaking, employees working from home receive the same protections as those working in the traditional office setting. Whether an injury is compensable under the applicable workers' compensation law will be determined based upon the specific requirements of that jurisdiction.

Two areas where workers' compensation laws are particularly important are:

**1) Coming and Going (and the Dual-Purpose Exception).** In most traditional arrangements (i.e., where the employee travels from his/her home to an employer-provided office space), workers' compensation laws usually do not cover injuries sustained while traveling to and from work. This principle is referred to as the "coming and going rule." However, there are situations in which an employee injured during his/her commute may be entitled to workers' compensation benefits including those described below.

- ✓ Under the "dual-purpose doctrine" or "dual-purpose exception," an injury arising during one's commute may be compensable if the trip serves both a personal purpose and a business purpose. For example, in North Carolina, a co-host of a North Carolina radio show traveled to a vacation spot a day earlier than planned in order to be able to call into the show from the vacation spot. The co-host was killed in an accident in route and the North Carolina Industrial Commission awarded benefits, finding that the decedent had dual purposes in traveling to the vacation spot at the time of the accident. This is one example of how the dual-purpose doctrine may be interpreted and different states may apply it in other manners.
- ✓ Under most workers' compensation laws, travel between two parts of an employer's premises is considered to be "in the course of employment." Where, for example, an employer has two plants and requires an HR manager to travel from one site to the other in the course and scope of his/her duties, in the event the HR manager sustains injuries during his/her trip from one site to the other, such injuries are likely compensable. In situations in which an employee primarily works at a home office and travels to a "traditional" office, an argument could be made that the trips to and from these offices are — at least at times — trips between one business site and another. Each situation will turn on the specific facts presented.

Generally, if the work is done at home for the employee's convenience, the going and coming trip is not a business trip within the dual-purpose rule, since serving the employee's own convenience in selecting an off-premises place in which to do the work is a personal and not a business purpose. In contrast, where an employer requires that an employee work from home, and an employee traveling between his/her "traditional office" and his/her home office to continue performing work for that employer is injured, it will be difficult for an employer to argue that the injury was not incurred in the course of employment. However, there are few bright-line rules in this context, and each situation must be assessed on the particular facts presented and assessment of factors considered in the particular jurisdiction.

**2) Injuries While Working at Home.** Although injuries occurring during travel to and from home (even a home office) may not be compensable, injuries occurring during the performance of work at a home office are generally considered to be in the course of employment (and, therefore, compensable) e.g., an employee working in a home office who, as part of



his/her regular job duties, works constantly at the computer and develops carpal-tunnel syndrome. The injury would likely be compensable regardless of the fact that the injury occurred at a home office rather than the traditional office. To mitigate workers' compensation claims, employers should consider providing training to their full-time, telecommuting employees regarding injury prevention and assisting their employees in setting up ergonomically-sound home offices.

### *Fair Labor Standards Act (FLSA) and Non-Exempt Employees*

Telework is not only for exempt employees. With the right set-up, non-exempt employees with the right job tasks can also be effective teleworkers. To provide telework options to non-exempt employees, make sure you have the following:

- **A Time Tracking System That Can Be Accessed Remotely.** Under the Fair Labor Standards Act (FLSA), employers are required to maintain certain records for each non-exempt worker including hours worked each day, the total hours worked each workweek, total overtime earnings for the workweek and the like. A number of software programs facilitate this process by allowing employees to "clock in" or "clock out" using computers that can potentially be located anywhere. Such systems provide a reliable method for proactively monitoring timekeeping to ensure accurate records and obtaining the employee's "signature" (whether in paper form or electronic) on the timesheets as to the accuracy to prevent the employee from subsequently challenging accuracy of those time records.
- **Clear, Well-Publicized Policies on What Constitutes "Hours Worked."** Under the Fair Labor Standards Act, non-exempt employees' hours worked are usually calculated based upon the time when the employee begins his/her "principal activity" and the time on that day at which he/she ceases the "principal activity." Other categories of time may or may not be compensable, depending upon the circumstances (such as travel time, rest/break times, etc.) For each type of non-exempt position that qualifies for any amount of telework, ensure that the employee and his/her manager clearly understand and agree upon what time is to be tracked and how (e.g., rest and meal breaks). Be as explicit as possible about when an employee should not be working (e.g., unpaid work breaks of 30 or more minutes) and his/her discretion about adjusting breaks and work schedule (e.g., can an employee work through lunch and end early?). Review federal and state specific laws that may affect your organization's policies.
- **Specific Overtime Expectations.** To avoid unauthorized overtime, employers should have:
  - ✓ a solid overtime policy in place that prohibits working any hours over 40 in a given workweek without advance written authorization from one or more specified individuals — this requirement of advance approval should also apply to situations in which employees are needed to work through their normally scheduled lunch breaks;



- ✓ a written policy that expressly prohibits working off the clock, under-reporting hours worked or over-reporting hours worked; and
- ✓ the employees acknowledge the written policy/policies (signed and dated acknowledgment) and conduct training on the policy/policies.

If an employee fails to obtain prior approval for overtime hours reported, the employer must still pay the overtime, but should take remedial action with respect to the employee's failure to comply with the policy.

### *Other Policy Considerations*

- **Travel and Equipment Funds for Full-Time Telecommuters.** Full-time telecommuting raises additional budget questions around paying for job-related equipment and occasional travel to the worksite. Your telework policy statements should include what resources you will pay for and which ones the employee is expected to provide or pay for as well as who owns any purchased equipment. There is no consensus on what should be covered by an organization, but below are a few rules of thumb for being strategic about cost questions.

- ✓ **Replace desktops with laptops and monitors as standard practice for all positions that receive a computer.** Laptops as a standard allows employees to seamlessly shift between work environments without having to purchase equipment every time a new employee teleworks. This also ensures that you own all the technology and software being used in your organization.
- ✓ **Consider "Bring Your Own Device (BYOD)" policies carefully.** Though these kinds of policies can cut costs, they can also create compatibility issues and make reclaiming your data and software from departing employees more complicated. BYOD policies work best when the data and software are stored on a server that employees access via their personal computers or smart phones.
- ✓ **Technology Maintenance and Data Security.** Whether you provide a device or have a BYOD policy, consider how well those devices will be able to protect your security. Do they have the appropriate password and encryption safeguards? Do you want to have a policy restricting the software that can be loaded on these devices or that all software be installed on computers solely by your IT team?

Also consider how equipment will be maintained and repaired. Does an employee with a broken home computer used for work take it to a public repair shop, even if there is confidential data on that personal computer? Are there help numbers or recognized IT providers to get support on malfunctioning software or connectivity? Partner with your IT providers early to get their input on how the technology can be best used to protect your data and give employees more flexibility.

✓ **Utility Costs.** Basic environmental costs associated with maintaining a home should be covered by the employee (e.g., heat, electricity and light) unless their work requires special conditions or equipment that would not normally be found in a home. Internet access is on its way to becoming a standard household utility with 73.4 percent of U.S. households reporting a high-speed connection in 2013.<sup>2</sup> Having employees pay for Internet access and phone lines is reasonable with two caveats:

- If employees do not have a choice about teleworking, employers should typically pay for any equipment necessary to do their job.
- If the work results in sizable increases in otherwise standard employee costs (e.g., making numerous lengthy, long-distance phone calls that apply additional fees), employers should cover these costs, as well.

In addition, employees and managers may need to have additional software such as instant messenger or video conferencing software to maximize communication efficiency. A number of these communication technologies are available for free or very low cost (though sometimes with limited options). Encourage managers to work with their teams to identify exactly which functions they need and where they can find the most inexpensive source of those options.

✓ **Furniture and Equipment Costs.** In general, employees should be responsible for maintaining their own workspace furniture (e.g., chairs and desks). However, if a position has ongoing ergonomic considerations to avoid employee injury (such as repetitive motion injuries from data entry work), it may be worthwhile to pay for such equipment. This ensures that employees are getting the right equipment, takes advantage of economies of scale in purchasing, reduces injuries and lowers the liability and health care costs associated with those injuries.

✓ **Travel to the Worksite for Full-Time Telecommuters.** It is essential that full-time telecommuters and employers understand early how travel will be managed, especially if travel costs are high (e.g., cross-country flights). A few rules of thumb for thinking about reimbursing travel are:

- **Is the travel more similar to a daily commute or a client visit?** If an employee is *required* to come onsite fairly regularly (at least once a week), then the position should be considered a regular telework position rather than a full-time telework position (as described under telework definitions) and travel to the worksite should not be reimbursed.

On the other hand, if the onsite visits are irregular and are focused on maintaining ties between the full-time telecommuter, coworkers or clients, the organization should probably pay the costs of the travel, especially if the employee could do a comparable job from his/her offsite workspace.

Strategically, it does not make a lot of sense to have full-time teleworker positions where the employee's out of pocket costs are so high that their earnings are significantly reduced, and they consider leaving. While expensive full-time telework situations should be considered for short-term situations (e.g., full-time teleworking while caring for an ailing relative or in anticipation of a relocation), organizations should not allow full-time telework when the job demands are more consistent with regular or occasional telework.

- **Use travel budgets** and give employees discretion about how often to come onsite. Travel budgets provide the employee with more flexibility and autonomy about what onsite events to attend (both work required and developmental events). Make sure the employee understands that once expenses exceed the budget, the remainder is covered by the employee, and the organization reserves the right to require attendance at any number of events.

### *Don't forget the details!*

Although most of the conversations around telework focus on big questions like eligibility, autonomy and performance, there are a number of technical details that should be considered, including:

- reporting requirements for hours worked or tasks accomplished on a regular basis;
- agreements about what hours employees should be available;
- agreements to adhere to broader policies that might have telework implications (e.g., non-harassment policies and data protection policies, etc.);
- any required inspections of home work stations to ensure safety or ergonomic policy compliance;
- safety issues such as an explicit prohibition against driving and teleworking;
- determining who is responsible for any tax liability stemming from offsite business activities and if there are tax deductions that the organization or employees might claim in relation to maintaining a home office; and
- whether employees are required to attend any trainings on telework before enrolling in the program.

Any or all of these items may be included in a formal telework agreement and should at least be considered before telework begins.

### Conclusion

Clearly, successful telework programs are more involved than simply allowing employees to work remotely. There are cost, performance management, legal compliance and other considerations that make the difference between having telework and capitalizing on telework.

The preceding tips are a broad overview of the kinds of things HR professionals should take into account when building their telework programs. Though Sections 2 and 3 of [Workflex and Telework Guide: Tips for Anyone to Work Anywhere](#) are written for managers and teleworkers, HR professionals familiar with how to integrate the advice in all three sections will be well positioned to lead the strategic use of telework for better individual and organizational performance.

# Section 2

## *Tips for Managers of Teleworkers*



MANAGER

**M**anaging teleworkers or being the teleworking manager of onsite employees is not truly that different from managing employees when everyone is onsite. You still need to provide goals, resources, sponsorship, evaluation, constructive feedback and other essential supports regardless of where you and your team are located. What is different is the need to plan out how you will deal with a few important logistical issues and stay informed about how work is progressing so you can keep things on track. The good news is that many of the skills you practice managing teleworkers are valuable for all your employees and you may find that the additional effort you expend setting up a positive telework experience will result in less work overall and new ideas on how to better manage your entire team.

The following list of tips are broken into five sections, each one focusing on a major question commonly asked by managers seeking to reinvent not just where their teams work, but how they will all work together to get the best results from telework.

- Who can telework and how much?
- How should employees apply for telework?
- How do I stay in touch with my remote team members?
- How do I make sure the work gets done?
- How do I handle performance problems among my teleworkers?

**It is okay to be wary of telework, especially if it is new or you've had a bad experience with it in the past. Use your doubts to make it better, ask hard questions and work out details; your experience and your team's experience will be better for it.**

**Before you go through this Guide, it is important to take a moment and be honest with yourself about your attitudes toward telework.** Do you think it's a boon to your team's productivity or an indication of a lack of commitment on the part of teleworking employees? Are you worried that people will take advantage or even lie about their work progress until it is too late to fix things? It is okay to be wary of telework, especially if it is new or you've had a bad experience with it in the past. Use your doubts to make it better, ask hard questions and work out details; your experience and your team's experience will be better for it.

On the other hand, if you think telework is the best thing since sliced bread, take a moment to consider whether you have thought about the new ways you will have to manage and communicate with people. Your optimism will inspire others, but make sure to temper that optimism by planning around what might go wrong and how to handle it. When Murphy's Law (the adage that anything that can go wrong will go wrong) rears its head and something eventually does go awry, you'll be better prepared to resolve it.

### Who Can Telework, and How Much

**Processes for deciding who can telework should be focused on jobs.**

Overall eligibility for telework should be based on whether a particular *job* can be done offsite, and that process should be as transparent and consistent as possible. It can be tempting to restrict telework to successful employees you already trust. However, basing telework eligibility on job tasks rather than personal characteristics and performance has two major advantages. It:

- reduces the chances that managers will grant access unevenly and your resulting vulnerability to claims of unequal treatment; and
- allows you to use telework as a performance improvement tool for employees who need flexibility in order to be successful.

If a job can be done remotely by one employee, then the option to telework should be available to all employees *with the same responsibilities*. For some jobs, this will mean just a few hours of telework eligibility, while others may work remotely for one or more days. Make sure the process and criteria you use to make your decisions about who teleworks are written down and applied consistently, and that there are also fair and equitable processes in place to determine whether an employee is succeeding in using telework.

Allowing employees access to telework based on their job descriptions is not the same as allowing them to all telework or to telework at the same time or in the same way. If onsite coverage is necessary for specific jobs, then you and your team need to set up telework schedules that make sense for the business.

Perhaps employees will alternate their telework days, or some will telework in the morning and others in the afternoon. You may need to work with employees to set up a system for determining how schedule conflicts will be resolved. For example, if two employees want to telework when one of them needs to be onsite, will you use seniority, reason for telework, a mutual decision-making process or some other system to make determinations?

This doesn't have to mean more work for you. Once you have set up a system, you can leave it to the employees to negotiate telework schedules according to that system and just require that you approve the final schedules. Employees will appreciate the opportunity to manage their own schedules, and you will have more time to do your own job.

Remember that employees are responsible for their performance wherever they work, and you retain the right to make changes as needed to support your team and the organization's goals.

**Allowing employees access to telework based on their job descriptions is not the same as allowing them to all telework or to telework at the same time or in the same way.**

The goal of a broad approach to telework eligibility is to let employees identify work arrangements where they do their best work rather than restricting telework to those who have already succeeded with onsite work.

### Occasional, Regular or Full-time Teleworker?

Deciding whether a position can function as a full-time remote position can be a complex task. In general, telecommuting and teleworking positions have the same characteristics, but telecommuting positions have a greater degree of those characteristics. Four of the most essential characteristics to consider are:

- **Do job tasks require onsite only resources?** In other words can the job be done at a remote computer or workspace?
- **Is walk-in customer service a primary responsibility?** Is the employee required onsite to deal with unscheduled, onsite appearances by clients or management?
- **Does the employee have sufficient independent access to information?** Can the employee get or request essential information, including feedback on their performance, when they need it?
- **Does the position have sufficient autonomy to work remotely?** In other words, are employees trusted with the responsibility to make day-to-day work decisions without frequent check-ins with onsite management?

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are responsible for their  
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organization's goals.**

There is no clear rule on how much of each of these characteristics is required to draw the distinction between occasional, regular and full-time telework. It is okay to experiment and see what options work and how to tailor them to specific jobs and employees so that it works for everyone, including you. Just make sure everyone involved understands the experimental nature of the process and that experiments can be terminated at any time for the good of the business.

### Change at a pace that makes sense for you, your team and your organization.

For some managers, this broad approach to telework is too much of a good thing, too soon. If you are one of them, know that it's okay to go with a more limited start to telework. A couple of things that can make telework feel more manageable to all involved are:

- stating explicitly that arrangements are considered on a case-by-case and individualized basis;
- stating explicitly that the organization reserves the right to discontinue telework arrangements at its discretion;



- maintaining a standard timeline for ongoing reviews of telework arrangements where changes can be made for the benefit of all involved;
- creating pilot programs or test periods with defined end dates, benchmarks for success, and the option to renew if all parties agree and the benchmarks are achieved;
- restricting telework to certain days, tasks or meetings where everyone is comfortable with telework; or
- requiring full-time teleworkers to work onsite for a period of time to form essential relationships, learn how the organization functions or for other specific business reasons.

Remember that test periods enhance performance when they are created by establishing a baseline for an employee's skills, relationships or knowledge. Test periods without such specific measurable goals just serve to redefine telework as a perk that has to be earned rather than a business strategy to be used as needed to maximize performance.

There are many options for setting a comfortable pace for an evolution towards telework, and you should remember that you have the right and responsibility to make sure telework is executed in a way that works best for all stakeholders. Eligibility for telework does not equal a right to telework on demand without open and consistent coordination, accountability and measureable outcomes.

**There are many options for setting a comfortable pace for an evolution towards telework, and you should remember that you have the right and responsibility to make sure telework is executed in a way that works best for all stakeholders.**

### How Should Employees Apply for Telework?

Check with your HR department or other organizational members who manage employee policies and procedures to see whether they have already established rules around how telework is managed at your organization. If they don't have any policies, share [Section 1: Tips for HR Professionals](#) of this Guide with them and work with them to set up any guidelines needed to make telework a reality for your team. If they do have policies in place, find out what they are and follow them. If need be, you can advocate for change after you have given the current guidelines a try. The following tips focus on the things you, as a manager, should do to make requests for telework get off on the right foot.

### State your openness to telework openly and often.

It's important for employees to know that you are open to telework *before* they need to telework. You don't need to say you love telework, but if they know it's an option and under what circumstances you would consider it, they are more likely to make constructive requests.

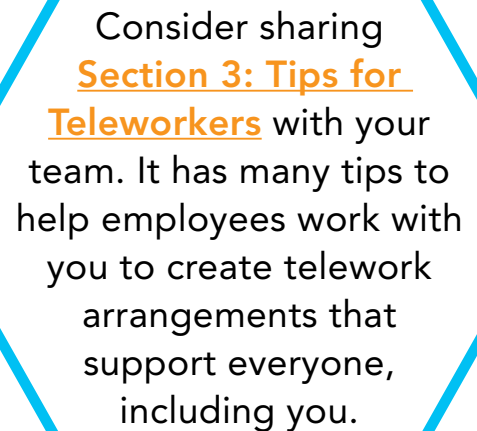
### Tell employees how to make a telework request.

Do you want them to talk to you first or fill out any paperwork beforehand? Should they have a plan ready when they make their request, or would you prefer to work on it together from the start? If you are clear about what makes your life easier when considering a telework request, employees are more likely to follow that pathway.

### Start all telework with 20 questions about what it means for the employee and the team.

Telework is more than just letting employees work remotely. It involves changes to how people communicate, assess performance and maintain relationships with coworkers and clients/customers. Whether you are 0% or 100% confident in an employee's ability to telework successfully, respond to the request with a conversation about what telework should look like. Make sure to include the following 20 questions in your conversation:

- 1) How will telework benefit the employee, the team, the organization and you? It's okay if one or more parties don't benefit in any specific way, so long as no one is disadvantaged by the telework arrangement.
- 2) How will the employee continue to access the resources he/she needs to do his/her job (e.g., files, computers, etc.)?
- 3) Who else needs to know when and where the employee is working to do his/her job?
- 4) How will the employee communicate his/her availability with coworkers and customers/clients on a regular basis?
- 5) How will the employee communicate work progress on an ongoing basis to you and other stakeholders?
- 6) What kind of flexibility is the employee willing to offer in return for telework? For example, would it be worthwhile to have the employee redistribute his/her hours to be available for multiple time zone conversations?



Consider sharing [Section 3: Tips for Teleworkers](#) with your team. It has many tips to help employees work with you to create telework arrangements that support everyone, including you.

- 7) Are there other forms of flexibility the organization may need to offer, especially schedule flexibility that might help maintain or improve performance?
- 8) What work processes need to be revised to incorporate telework effectively?
- 9) Would another form of flexibility help achieve the employee's goals if telework is not a possibility?
- 10) For how long should the telework arrangement(s) continue?
- 11) What hours and days will employees work and from what location(s)?
- 12) Are there multiple configurations of days, times and worksites that would work for everyone? Consider whether another form of flexibility would help you and the employee achieve your goals in case telework is not a possibility.
- 13) Are there specific hours that employees must be available on or offsite to accomplish their responsibilities?
- 14) Will deadlines still be met, and will employees be available for critical, unplanned situations? This question is also a good opportunity to discuss what constitutes a critical, unplanned situation using specific examples. The description of urgent and important situations in the **"Be strategic about how and when you communicate"** section below is a good place to start.
- 15) Can employees make arrangements to be onsite for location-specific activities?
- 16) What are employees' performance goals this year?
- 17) How will employees meet job expectations in their new telework arrangement(s)?
- 18) How will you know employees are getting the work done?
- 19) How and when will you and employees assess the effectiveness of the arrangement(s)?
- 20) What performance measures should you and your employees use to demonstrate success?

### **State your expectations during the conversation.**

Telework is different from onsite work in a number of ways, though most of them revolve around different norms for communication, assessment and relationship management/networking. It's important to lay out your expectations of what these norms will be early in a telework arrangement. The next set of tips describes some of the expectations you should establish before your employees begin teleworking.

## How Do I Stay in Touch with My Remote Team Members?

### Provide the right resources.

Review the communication options at your organization. Email, phone (voice and text), instant messenger, video conferencing and occasional in-person visits are all ways to stay in touch with remote employees. Before you decide that an employee should telework, make sure you and everyone else who works with that employee is prepared to use the best options for communication. Remember that when an employee teleworks, everyone needs to enhance his/her communication and technology skills, not just the teleworking employee. Pursue the best resources for your team and voice your support for using richer media, like video conferencing, so everyone realizes that *the team* is expanding its communication options and skills. A number of these resources are free or very low cost (though sometimes with limited options). Take some time to identify exactly which functions your team needs and sources of those options for little to no cost. Emphasize that this isn't simply to accommodate the remote employee, but to improve overall functionality and create flexibility options for everyone.

### Set expectations early.

As a manager, employees will be looking to you to understand what their telework situation should look like. Make sure you have an explicit conversation with your whole team (both teleworkers and those working with them) about the following:

#### *Availability and Responsiveness*

When do you expect employees to check their email or answer their work phones? How quickly do you expect a response to an email or a voicemail? Are there blackout times when employees can separate from their work or devices to focus on personal/family matters? How should employees signal when they are going to be unavailable, and under what circumstances? For example, do you want an email when employees come and go from lunch or have a work meeting at a client's office?

### TO CALL OR NOT TO CALL: IS THIS AN EMERGENCY?

**Important tasks** have significant effects on your overall work outcomes.

**Urgent tasks** are time sensitive and need to be done relatively soon if they are to be done to best effect, but the results may or may not be significant.

#### Tasks that are:

- **just important** need to be done, but there is still enough time to do so without disrupting normal operations;
- **just urgent** may need to be done soon, but probably aren't worth the cost in resources and morale to disrupt normal operations; and
- **both important and urgent** are worthy of disrupting normal operations and calling someone during their off hours.

However, urgent tasks can create feelings of stress that give the impression they are important. Being able to know the difference between tasks that are one, both or neither of these things is essential to proper prioritization.

How should your team members — both those who are teleworking and those who are not — cover for each other?

### *Data Security*

What systems does the employee use? Are there confidential data on those systems? Who else has access to the employee's offsite workspace and computer? Is it running the right anti-virus programs? How should files be moved around: via email or through a shared server? Use the resources your organization provides — such as your HR and IT departments or other experts — to ensure that teleworking employees properly manage data.

### *Coming into the Office*

Are all onsite events (meetings, presentations, trainings) mandatory? Will you tell telecommuters which ones to attend or should they use their discretion? If an employee teleworks full time from far away, will the organization cover costs for onsite visits? If the organization covers travel costs, how many visits are covered, and under what conditions is a visit covered? For example, do full-time teleworkers need you to request their presence or can they initiate a visit on their own? If a full-time teleworker visits the workplace, where will they sit and work while onsite?

### *Emergency Onsite Requirements*

Sometimes an employee will be scheduled to be remote but be required to be onsite for a critical situation. When that happens, is the offsite day lost? Or does he/she get another in its place? How much notice can an employee generally expect before being called in?

### *Spontaneous Meetings*

If a spontaneous meeting is called, how will you make sure offsite employees are suitably involved? How will such meetings be conducted (in-person only, phone calls, video chat, instant messenger, texts on a smartphone or some combination of methods)? Will you contact the employee for the meeting, or should he or she call into the meeting? Who will be responsible for this coordination?

### *Technology*

Do you have the right level of communications technology to stay in touch the way you need to? Would collaboration programs or richer communications tools enhance your work together? Should your team get a training session on how to use the new technology so that everyone is proficient in it? Is all the technology in working order and properly maintained so that you can rely on it on short notice?

### **Be strategic about how and when you communicate.**

The most essential aspect of managing a teleworker is to stay in touch despite the distance. This includes calls when you need something in the moment, regular check-ins even when there is nothing pressing, and general social contact to build trust and collaborative relationships.

The following tips describe different ways to maintain contact to best effect for each of these three types of communication. No method of communication is bad, but phone, email, texts, instant messenger and other options each have their own strengths and challenges and should be used strategically based on the situation.

#### ***Immediate Need***

Email is a poor communicator of urgency. Most email alerts are set up so that there is no way to distinguish between a piece of junk mail and an email from an angry client. As a result, employees are forced to check email constantly, creating a sense of always being “on.” Establish with your team, coworkers and clients clear times when email should get a quick response and when it is appropriate to let something wait till the next day. Draw a distinction between items that are urgent, important, both or neither. Items that are both urgent *and* important should generally be communicated by phone calls, not email. If you need to send urgent information in an email, use a phone call or at least a text message to draw their attention to the email. If you use email or text messages to convey urgent information, include an explicit request for a response, so you know that your message has been received and the employee is taking appropriate action.

On the other hand, texting and email can be useful alternatives to a tap on the shoulder for getting the attention of a teleworker who might be in a phone conversation.

If something important is missed because it was sent by email, remember to base your response and any corrective action on whether or not the people involved followed the agreed-upon protocol. If you find that the protocol didn’t work as well as expected, you can address that, too.

#### ***Ongoing Strategy and Logistics***

If a sensitive situation emerges — where you or someone else may have a strong reaction to something that took place — avoid email discussions. Request a phone or video call to add greater depth to the dialogue. Do this for both positive and negative news. It will give you the opportunity to head off misunderstandings around bad news. For good news, a call is important to let employees know that you see the connection between them and their good work. Sending a follow-up email with the resolution of your conversation further cements their contribution onto the official record and will make it easier to do performance evaluations later.

### *Social Connection*

Plan around the social aspects of work activities. If you are having a meeting where teleworkers can meet new people (such as leaders who might advance their career and other teleworkers), invite them to that event, so it is clear that they are important members of your team. Use richer communication media for your work interactions, like video chats and phone calls. Interacting with you in real time where they can see your facial expressions or hear you laugh at a joke will be more rewarding than the same exchange on email and help keep them connected to you and the organization. Have regular contact via email or phone calls even if there is no pressing business to discuss. A regular five minute check-in can provide a strong foundation for the relationships you will need to manage the opportunities and challenges facing your team.

### **Create a strategy for fostering teamwork and collaboration.**

The ability to collaborate and share ideas to foster innovation is an essential ingredient of success for many organizations. It is reasonable to fear that telework will disrupt that collaboration and hurt performance. Yet, if telework is managed strategically, it doesn't have to suppress collaboration and may, in fact, *improve* collaboration. Keep the following things in mind when you are looking for collaboration in your team, and you should find that information sharing and idea generation remain high despite a dispersed team.

### *Help people be clear about what they mean by collaboration.*

People can confuse a feeling of satisfaction with a conversation with the quality of ideas exchanged. Face-to-face meetings are a richer source of social exchange including body language, tone of voice and facial expressions. These forms of social exchange enhance people's sense of connection to the conversation and their colleagues. People can have a very productive virtual collaboration and still feel unsatisfied compared with face-to-face conversations.

Ask your team and colleagues — who claim that there is a lack of collaboration — what good ideas and/or essential information isn't getting shared properly. If they can't point to identifiable gaps, try using a richer communication medium for your next collaboration event. If you are using email, ask for a phone call. If you are using phone calls, try a video conference. Use the communication medium that people feel most secure with, even if it takes a little more effort. People will be more responsive if they feel like the conversations are fruitful, even if productivity is objectively the same in virtual and in-person meetings.

### *Have kick-off meetings in person.*

Research has shown that teams that start out in person and then switch to virtual communication methods have very similar results to those who meet in person all the time.<sup>34</sup> The key is to have the most complex and group forming meetings in person. Then, as people switch from generating ideas to implementing them, the need for in-person meetings will decline, and regular, virtual communications will do just as well.



### *Diversify the way you brainstorm.*

The standard vision of brainstorming meetings is a bunch of people in a room calling out their ideas and one person frantically trying to jot it all down on a flipchart. That kind of brainstorming tends to bury the ideas of quieter people who take longer to verbalize their ideas or who are low on the organizational hierarchy. Yet, since everyone was in the room and there were lots of voices calling out ideas, people tend to feel like collaboration took place.

To capture more ideas — especially from unusual suspects — try including some virtual brainstorms. Get everyone on a video conference program with a chat window. That allows more extroverted people to speak and be heard, while more introverted people can listen to others speak and get their ideas on the written record without having to fight their way through the conversation. The facilitator should monitor the chat window and carve out space for the less forceful speakers to elaborate on their ideas. This ensures that less vocal speakers will have something constructive to say when the facilitator gives them the floor.

It may take a few tries to get a good rhythm going, but there are a number of reasons to develop virtual brainstorming skills beyond just conquering distance. Virtual brainstorming allows opportunities to do anonymous brainstorming where people can offer unconventional ideas without fear of ridicule or reprisal. It also helps with brainstorming in large groups where there are too many people to equitably share air time.<sup>5</sup> Fully virtual brainstorms (as on instant messenger) benefit from having a record of all ideas and their originators without relying on a human transcriber.

### **How Do I Make Sure the Work Is Getting Done?**

#### **Review how you already communicate with and evaluate staff.**

A common question managers new to telework have is: “How will I know they are working?” But, before you answer that question, answer this: “How do I know they are working now?” Unless your employees are making widgets, just because you can physically see someone doesn’t mean that you know what they are doing. Informal conversations in the hallway, while easy, are not reliable substitutes for the more formal check-ins on work progress that are necessary to keep your team’s work on track. Employees in the office may still spend lots of time on Facebook or other social media, and not every problem will surface before it becomes a major issue. If you don’t have regular opportunities to communicate with your team, hear how they are doing and what they need to be their best, then you will have problems whether they work remotely or not. Look to concrete measures of performance such as products made well and on time, comments from coworkers and clients praising or complaining about the employee, the frequency and quality of ideas they contribute in meetings, etc. If you do this for all your employees, you may be surprised by what a direct comparison of work outcomes among your teleworkers and onsite employees reveals.



### Evaluate performance regularly.

Don't wait for your team to tell you if the telework situation is working for them and the organization or not. In general, employees do not take the time to point out things that are going well and according to plan. They also tend to avoid mentioning small fixable problems until they have expanded into larger problems with a lot of negative feelings built up. Making a commitment to more frequent check-ins will help to keep you in the know about an employee's performance. How often you should check in depends on the difficulty of correcting problems as well as the potential consequences of a problem — though once a week is a good rule of thumb. More frequent check-ins are needed when an employee's work has the potential to cost significant resources (e.g., money, time, social capital, etc.) to fix if a problem emerges.

During check-ins you should review whether:

- ✓ Things are going well on a teleworker's projects and if there are any changes that would make things better.
- ✓ Coworkers and clients are receiving the service they need from your team and what would make things better.
- ✓ The teleworker's assignments are being met with quality and timely delivery.
- ✓ Your technology (computer, phone, access to servers, etc.) meets your present and future needs for communication and data management.
- ✓ There are concerns and/or problems that you or another stakeholder have raised.
- ✓ There is documentation of how the telework has been beneficial for you, the teleworking employee(s), the onsite team, clients and the organization (e.g., better customer service, faster response times, better coverage, less overall stress, etc.).

If you find that things are not going the way you would like, reach out to the teleworker and schedule a time to talk in greater detail about what you've learned and what he/she thinks about the situation. Give the employee a chance to voice his/her side of the story, and then collaborate on solutions. Offer to help as appropriate and plan another check-in date. Focus on the importance of achieving work goals, just as you would with an onsite employee who is having performance issues.

### How Do I Handle Performance Problems among My Teleworkers?

If you have followed the other tips in this Guide, chances are good that your team is succeeding with telework or at least working through the obstacles together. If something isn't working, check the tips to see if there is an idea you can try out to improve things. However, even the best people management techniques don't work for everyone, and you may have some teleworking employees who are struggling to be successful despite your best efforts.

It is understandable to want to pull a poorly performing teleworker back onsite, so that you can better oversee their work. It's totally acceptable for you to counsel or even require an employee

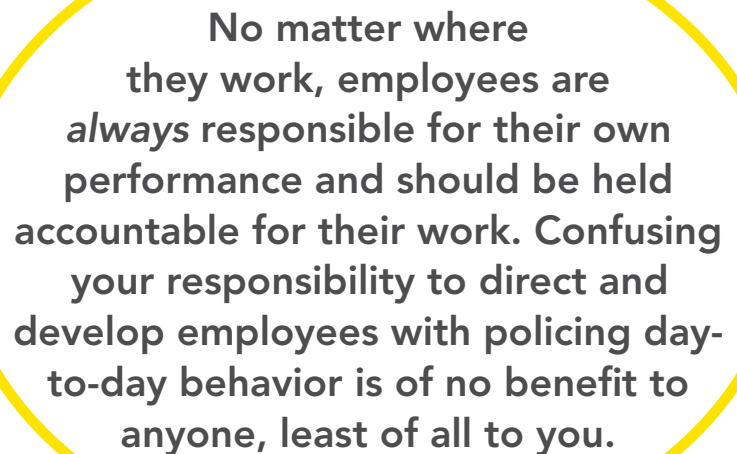
to work onsite for additional coaching and support (e.g., opportunities to go over work in progress together during the day). However, if no additional support options are available onsite, then requiring a struggling employee to work onsite is merely punitive and possibly wouldn't result in any better results than continuing to allow him/her to work offsite.

Most workplaces are also filled with distractions, so being onsite does not guarantee employees will be more focused or productive. For this reason, a simple “no telework” solution is not guaranteed to achieve the results you really want: a productive employee who doesn't consume too much of your time and energy.

If you are considering denying telework to an employee in a telework eligible job, ask yourself if forcing the employee onsite will improve productivity because:

- The onsite employee will eventually be able to self-manage his/her time and effort.
- You will be providing constant, direct oversight of the employee.

If the former is true, helping employees recognize where they do their best work and identifying other forms of flexibility that might meet their needs is preferable to simply denying access to telework. If you help an employee come up with an alternative to a bad telework situation, you can help develop the employee's abilities to self-manage and maintain his/her engagement with long-term performance maintenance. More importantly, making a directive to work onsite a last resort will help keep you time free from micro-managing the employee.



**No matter where they work, employees are *always* responsible for their own performance and should be held accountable for their work. Confusing your responsibility to direct and develop employees with policing day-to-day behavior is of no benefit to anyone, least of all to you.**

If the latter is true, you should consider whether it is worth bringing such employees back onsite if they will still be a significant drain on your and/or the team's resources. Such employees are better candidates for performance improvement plans and possible separation regardless of where they work. You should use all of the constructive tools in your toolbox to help the struggling employee improve his/her performance (e.g., a written performance improvement plan that both of you create, frequent check-ins and plans to assess how the improvements are working).

You can also ask HR or others for resources your organization provides such as EAPs that can coach the employee on time management and other skills. Ask the employee if there are other personal concerns that might be better managed with support from the organization (such as other forms of flexibility). If these strategies aren't effective, then it is time for you to pursue a termination, as you would for any other poorly performing employee.

Retention under more rigid circumstances may breed resentment and a downward performance spiral from both the employee and you as you waste resources chasing after non-performing employees. No matter where they work, employees are *always* responsible for their own performance and should be held accountable for their work. Confusing your responsibility to direct and develop employees with policing day-to-day behavior is of no benefit to anyone, least of all to you.

### Additional Considerations

#### Watch out for overwork.

Telework allows employees to potentially work anywhere and at any time. It is important to make sure this advantage does not transform into working everywhere and all the time. Though having employees work more may sound good on the surface, when employees are overworked and can access each other anytime, they tend to plan less and become less efficient. Overwork can result in costs — sometimes significantly high costs — to the organization in terms of turnover and client dissatisfaction. In contrast, when employees have clear boundaries on their time and accessibility, they can plan ahead and be more efficient, improving both their opportunity to take care of themselves and their customers/clients.<sup>6</sup>

Combat overwork by having explicit times where employees are not expected to be checking email or taking calls, except in the case of emergencies. If employees and managers find that they cannot regularly respect those boundaries, then overwork can and probably will ensue. If this happens, challenge your teams to stop and reevaluate their work patterns and management styles to restructure work to protect these safe times. Research has shown that this results in better job satisfaction, performance and client satisfaction.<sup>7</sup>

Wondering what the many types of workflex are beyond telework? An overview of the categories of flexibility are available in a free download: [The Workflex Primer](#). You can also find it at [WhenWorkWorks.org](#).

#### Provide clear explanations and guides for stakeholders outside of your team.

All forms of workplace flexibility are more effective when they are created with a systems mind-set, and telework is no exceptions. Consider how telework will alter communications between onsite and teleworking employees, clients, colleagues in other departments, senior leaders and yourself. Give special attention to colleagues in other departments who may not know the ins and outs of your team's work processes. Will other departments — especially those that can't or won't participate in telework — know how to get what they need on time?

Identify key communication channels between your team and other departments, and make sure all have an informed and supportive explanation of how telework functions within your

team and know when and how to get in touch with teleworking employees. For example, approach people in other departments who make regular requests with short deadlines before telework starts. Explain the process, and ask for their input on what kind of contact options (e.g., phone, email, regular meetings, etc.) and notice of telework schedules they need to do their jobs. By involving them from the beginning in this process, you can avoid a number of future problems. Furthermore, when all key stakeholders in your organization have participated in shaping your teleworking program, they will be more apt to help resolve work problems if and when they do arise — rather than demanding that telework be ended.

### **Sponsor your teleworkers' advancement.**

Out of sight should not mean out of mind, but your teleworking team members will need your support to stay visible. During your regular discussions, ask them what other people in your organization or among your clients or customers they feel they should meet, and facilitate those connections. Enable your teleworkers to select high-profile or developmental projects that showcase their skills. Make an effort to mention them by name during discussions about their work, and offer to connect leaders with them as appropriate. Consider whether having a teleworking employee make a personal appearance at a meeting would be a gateway to more recognition and respect for your team and its leader. If trainings are being offered, look into how the employee might attend them in person, remotely, or if it would be possible to take a similar training at the employee's location.

Clearly, successfully managing teleworkers is more involved than simply allowing employees to work remotely. There are communications, performance management and other considerations that make the difference between just having telework and making telework a valuable strategic tool.

The preceding tips are a broad overview of the kinds of things managers of teleworkers should take into account when fostering telework in their teams. Although Sections 1 and 3 of [Workflex and Telework Guide: Tips for Anyone to Work Anywhere](#) are written for HR professionals and teleworkers, managers who understand these other perspectives will be well positioned to lead the strategic use of telework for better individual and organizational performance.

# Section 3

## *Tips for Teleworkers*



TELEWORKER

Successful telework is about more than just working offsite. How you advocate for becoming a telecommuter, then structure the new workspace, adapt routines and interact with colleagues are all essential considerations. The following tips are designed to help you reinvent not just where you work, but also how you and your manager(s) work to get the best results from telework.

The tips are broken into two sections: applying for telework; and excelling at telework. If you are not currently allowed to telework or are looking to redefine your telework arrangement, you should begin with the tips on applying for telework. If you are already in a telework arrangement, you can skip to the section on excelling at telework.

### Applying for Telework

If you are not currently teleworking, you should begin by checking with your HR department or other organizational members who manage employee policies and procedures to see whether they already have established rules around how telework is managed at your organization. Look for any posted application forms or guidelines.

If they don't have any policies or have a policy against telework, share **Section 1: Tips for HR Professionals** of this Guide with them. Work with your manager to persuade the organization to reexamine its stance on telework or to set up any guidelines needed to make telework a reality for you and your team. If there are policies in place, find out what they are and follow them. If need be, you can advocate for change after you have given the current guidelines a try.

In most processes, there will come a moment when you will need to approach your manager and get his/her buy in on your new way of working. The following tips are to help you shape that conversation to best effect for you, your manager and the others who depend on your work.

#### **Before you approach your manager, you should put together your talking points.**

How will telework benefit you, your team, your manager and your employer? It's okay if one or more parties don't benefit in any specific way, so long as no one is disadvantaged by your telework arrangement.

- How will you continue to access the resources you need to do your jobs (e.g., files, computers, etc.)?
- Who else needs to know when and where you are working to do their jobs?

Another useful resource for thinking about the best workflex options for you and how to go about pursuing them is the free [Workflex Employee Toolkit](#).



- How you will communicate your availability with coworkers and customers/clients on a regular basis?
- How will you communicate your work progress on an ongoing basis to your manager and other stakeholders?
- What kind of flexibility are you willing to offer in return for telework? For example, would it be worthwhile to redistribute your hours to be available for multiple time zone conversations?
- Are there other forms of flexibility the organization may need to offer, especially schedule flexibility that might help maintain or improve performance? Consider whether another form of flexibility would help you achieve your goals in case telework is not a possibility.
- What work processes need to be revised to allow you and others to incorporate telework effectively?

**Consider some of the logistics of your specific telework arrangement.**

- For how long should the telework arrangement(s) continue?
- What hours and days are you proposing to work and from what location(s)?
- Are there multiple configurations of days, times and worksites that would work for everyone?
- Are there specific hours that you must be present to accomplish your responsibilities?
- Will you be able to continue to meet deadlines and be available for critical, unplanned situations? Using specific examples, ask your manager to describe what he/she considers a critical, unplanned situation where you may be called outside of your normal hours or need to go onsite.
- Can you make arrangements to be onsite for location specific activities?

Consider reviewing [Section 2: Tips for Managers of Teleworkers](#) to better understand your manager's perspective and how you can craft your proposal to be a clear win for you, your manager and your organization.

**When speaking with your manager, make sure you reflect the following sentiments in your comments.** Include your:

- commitment to share the responsibility to make a flexible work arrangement successful;
- understanding that a flexible work arrangement is not an entitlement, but rather, another way of meeting organizational goals;
- willingness to work with your manager and the rest of the team to make telework a success for everyone; and

- the manager's priorities for getting work done and assuring quality. If you tailor your comments to your manager's priorities, you will find him/her more receptive to the idea than if you focus on what you get out of telework.

**Take the initiative to describe how your work can be assessed while you are teleworking.**

While few people really enjoy having their work judged, it's much better to offer up your preferences early than stumbling through when you are not receiving credit for your work or being blamed for a preventable problem. Some things to consider are:

- What are your performance goals this year?
- How will you meet job expectations in your new telework arrangement?
- How will your supervisor know you are getting the work done?
- How and when will you and your supervisor assess the effectiveness of your arrangement?
- What performance measures should you and your supervisor use to demonstrate success?

**If your initial request is refused, don't be discouraged. Ask questions about why it was rejected and how you could change the decision.**

- If the nature of your work is currently incompatible with telework, look for ways to redefine how work is done, so that it is more compatible with telework. This may take some research on your part, and you will need to consider costs and other business needs. Even if you don't come up with a solution, you will have a better understanding of your organization's business practices that might help with finding another position that works better for you and allows telework.
- If your performance is in question, ask your manager what he/she would need to see in order to believe that your performance would be the same or improve under a telework arrangement. Be open to the feedback, and ask for specific metrics that you would need to meet in order to revisit the question of telework.
- If your manager is simply unsupportive of the idea of telework, you can try to persuade him/her of the value of a telework arrangement. Focus on how it would benefit your manager and possibly reduce his/her workload. Ask for a trial period or other limited form of telework with a clear end date that needs to be actively renewed. That way, your manager can experiment with telework without fearing that he/she has set up a situation that can't be backed away from if it doesn't work. Consider whether there are allies (e.g., another manager or HR professional) who can suggest alternative arguments or who might be able to persuade your manager to give telework a try. Always be respectful of your manager's position, and — unless you mean to lodge a formal complaint — couch any conversations with others as a request for inspiration to build a better proposal.



### Excelling at Telework

#### Optimize your workspace.

*If you are planning to or are working from a home office space:*

- **Maintain clear boundaries between your work and home spaces.** Ideally, work in a separate room from the rest of your home activities. If a separate space isn't reasonable, look for ways to transition your space between work and personal time. For example, you can maintain a clean desk policy and store all your work and personal papers in separate drawers, so you won't be distracted by one while being involved in the other.
- **Invest in furniture that will keep you comfortable throughout the workday.** Check with your employer or a consultant in your community for a professional ergonomic evaluation, or use one of the free self-assessments from the [National Institute of Health](#).<sup>8</sup>

*If you are planning on working offsite, but not from home:*

- **Consider the distractions in the offsite location.** Avoid places where you will be disturbed or interrupted frequently.
- If you need to be available by phone, **make sure your mobile phone number is accessible to everyone who might need to contact you.** You should schedule calls for times when you can be in a quiet place or be close enough to one to quickly take an unexpected call.

**Use headphones** to minimize distractions in busy locations.

- **Consider data privacy and equipment security.** No one should be able to see confidential data on your screen or overhear private calls during your workday. Also, think about whether a laptop will be safe if you need to step away for a moment.
- **Do not drive and telework!** Plan to work when stopped for meals or at hotels or car pool so that you are not driving while using a laptop. Make sure to use a hands-free headset if you talk on the phone while driving. Avoid scheduling very complex or heated discussions while driving. If a conversation is overly distracting, either pull over to finish the conversation or request that it be continued at another time when you do not need to divide your attention.

#### Optimize communication methods and technology.

Telework is made much easier and more efficient by the communications technology that has exploded throughout society in the past few decades. Making the most of that technology will improve your telework experience and outcomes.

- **Develop contingency plans for short notice meetings.** Ask what the plan is for getting in touch with you for spontaneous meetings. If your team doesn't have a plan, help them come up with one, and then test the technology outside of those meetings. Finding that the video feed is not working and the phone has bad reception in the middle of an emergency

meeting can be very disruptive and may reduce your team's investment in including you in these meetings.

- **Use instant messaging and status indicators** (e.g., available, busy, on the phone, etc.) to inform others of whether you can be reached. This can help reduce the concern that you are not working when you are busy attending to another work task. If there are no instant messaging options at your workplace, send an email to important stakeholders if you will be out of touch for a longer time than usual.
- **Check if your organization's phones have a call forwarding option**, which will redirect calls from your office line to your offsite workplace so others don't need to keep track of multiple numbers. If a call forwarding option is not available, be clear in any voice mail messages about how to best reach you on remote workdays. Check your voice mail routinely.
- **Use electronic calendars** which offer the option to share appointments and note free and busy times. They can take some of the mystery out of when you will and won't be available. People tend to dislike having to change dates for meetings once made, so the more information they have about your availability upfront, the happier everyone will be.
- **Don't multi task during teleconferences** as this can distract you at crucial moments where you may be called upon to participate unexpectedly. Remember to mute your phone when you are not speaking, so that the clicking of keyboards or a comment to others in your environment doesn't signal that you are not paying attention.
- **Use video conferences whenever appropriate.** Make sure the space behind you and your attire are appropriate for fellow employees to see. Relocate loud animals during important phone calls or video meetings. Let others in the area know you will be on a call, so they don't walk through the area on camera or call out to you unexpectedly from another room.
- **Be an advocate and mentor for using the communications technology that allows you to telework.** Offer to show others how to get the most out of the technologies on which you rely. Don't just count on it working all the time or for an IT person to be on hand to help you out. As the remote person, others will expect you to be the most knowledgeable in the technologies you use.

### Telework Wellness

Plan your offsite workday, so you do your work when your attention and energy is best focused on it. For example, if you are a morning person, do your hardest or most creative work in the morning when your energy is high. Leave the more routine tasks for later in the day when you won't need as much attention to do a good job. Coordinate with your team, so they don't disturb you during this time and so you know to deliver what they need to get their jobs done during your focused work periods.

- **Set up a routine for eating and taking breaks.** You won't have coworkers on hand to provide you reminders to go eat or help you refresh your thinking with a break, so set an alarm

on your calendar, clock or a wellness related app instead. Similarly, sticking to this routine can keep you from overeating when food is just a short trip to the kitchen away.

- To prevent eye strain, **take breaks from the computer** wherever you are working, but especially at home where you won't have natural interruptions to give your eyes a rest. A good rule of thumb is to take two 15-minute total breaks from work as well as four five-minute pauses, evenly spread throughout your workday to rest your eyes. Or use the 20-20-20 rule. Every 20 minutes, look away about 20 feet in front of you for 20 seconds.<sup>9</sup> Don't worry about productivity during these breaks. Taking breaks can help improve efficiency, so the same amount of work can get done in less time and with less strain on your eyes.<sup>10</sup> You can also use the pauses to take a moment to strategize or plan next steps for your day.
- **Proper nutrition and hydration** can suffer if you fall too deeply "into the zone." Make sure you have water near your desk (in a safe container). Prepare healthy snacks in advance (perhaps during the time you would otherwise be commuting), so you don't get tempted to just grab a bucket of ice cream from the freezer.
- Even though working offsite provides more flexibility around stop and start times, **being consistent is still good for you** (keeping work stresses from invading your recovery time) and helps your coworkers understand that working offsite does not mean working all the time. If your start and stop times are too fluid — or you don't coordinate your start and stop times with your coworkers — you may find that you end up always being "on."
- **Establish a daily habit to transition from work to home** (e.g., change of outfit, shut down computer, step outside) to mentally indicate your workday has ended. Consider adapting habits that worked for you when you only worked onsite. For example, if you've always had a long commute, take a drive around the block to make use of old habits in new ways.

### TO CALL OR NOT TO CALL: IS THIS AN EMERGENCY?

**Important tasks** have significant effects on your overall work outcomes.

**Urgent tasks** are time sensitive and need to be done relatively soon if they are to be done to best effect, but the results may or may not be significant.

**Tasks that are:**

- **just important** need to be done, but there is still enough time to do so without disrupting normal operations;
- **just urgent** may need to be done soon, but probably aren't worth the cost in resources and morale to disrupt normal operations; and
- **both important and urgent** are worthy of disrupting normal operations and calling someone during their off hours.

However, urgent tasks can create feelings of stress that give the impression they are important. Being able to know the difference between tasks that are one, both or neither of these things is essential to proper prioritization.

## Staying on Target

- Do a time management self-assessment. There are plenty of free ones available with a quick Internet search. However, they all generally come down to a few key questions:
  - ✓ Do you regularly plan how you will use your time?
  - ✓ Do you regularly keep to those plans, despite the usual amount of distractions?
  - ✓ Do you regularly prioritize based on importance rather than urgency? (See sidebar: To Call or Not to Call.)
  - ✓ Do you regularly recover from interruptions and get back on track?
  - ✓ Is your output at the end of the day typically what you expected at the start of the day?
  - ✓ Do you usually need to work longer than you expected to achieve what you had planned?

If the answer to any of these questions is no, you should spend some time thinking about why. This is a good time to talk to a trusted colleague or your organization's employee assistance program — if you have one — or others about how to assess and improve your work habits and how you structure your time. This reflection period is also a great opportunity to engage the entire team in a discussion on how you can support each other's time management for ongoing success on and off the job.

- **Write down your work hours and tasks accomplished**, either in a journal or through regular (usually weekly) emails with your manager and/or colleagues. Being able to look back through emails that show the history of your telework situation and your accomplishments can make conversations with managers easier. It can also help them feel more connected to you and the work you are doing, even if they don't see you every day. It will also make their job easier at performance review time, providing a more reliable record of your accomplishments than mere memory.
- Although it's essential to have a core defined workspace to help separate work time from home time, **add a little bit of diversity to keep the day from becoming monotonous**. For example, taking phone meetings in another room or sitting in a different chair can help provide some additional novelty throughout the day and refresh your attention during important moments.
- **Check your computer apps for automated triggers and distractions**. Deactivate alerts that pop up during the day for things that can wait until after you are finished working or during a break. For example, if your phone alerts you to every new Facebook update posted by your very active social network, either disable that feature during the day or put your phone far enough away so that you can hear it ring in an emergency, but don't hear every buzz. Let people who regularly text you during the workday know that you need to focus during those times and that you will respond during breaks or after work, so they are not surprised by your change in responsiveness. Remember that communication technologies are there to achieve your goals. You are not there to respond whenever they buzz.

- **Create routines to help you resist distractions.** Beginning your day with a routine set of actions — like clearing email, creating a list of key priorities for the day, etc. — can help anchor you in your work mode and help shut out distractions. It is best to be deliberate about creating a routine and doing it when you first start teleworking. It will be much harder to establish a good routine later on if you find you have problems focusing, since that means both undoing a bad routine — which often takes a lot of work — and starting a good routine.
- If you have other people in the home during your workday, **communicate your routine** to them so that they can use that as a signal that you have shifted to your work mode and should be left alone as much as possible. Be clear about how you signal to them when you are working or taking a break. This way it won't feel like you are ignoring their presence all day, but, rather, communicating when they won't have to compete with work for your attention.

### Managing Relationships with Your Family and Friends

- Just like coworkers can disrupt your workflow during the day with unscheduled visits, family and friends who don't understand that you are *working* at home may also interrupt your day. Don't wait till they pop by to explain your work situation. You may not have time to keep them from being hurt by a brush off. **Before you start working from home, take a moment and explain** to them:

- ✓ your regular work times
- ✓ your regular break times when you would invite a distraction
- ✓ the list of emergencies that warrant breaking into your workday
- ✓ any non-verbal signals for when you are on and off duty

The non-verbal signals, like a closed door, a sign, background music, etc. are especially important to discuss, as these are easily confused. For example, if you work best with background music, someone else may interpret that as a sign that you are off duty and feel free to interrupt you, and then they may be hurt when rebuffed.

- **Communicate with others who must share your space** on how their activities during the day may affect your work, and collaborate on how they can do what they want while not disturbing you. Negotiate things like:
  - ✓ appropriate music and TV volume levels
  - ✓ whether your work room is open for them to pass through or spend time in, as well (such as when the computer is in a shared bedroom rather than a private office)

In any conversation where you might ask someone to change their behavior, it is always best to start by engaging them with what they want and need, and share your interests. Once your mutual goals are on the table, then you can look for ways in which everyone can continue doing what they want without interrupting you. That may necessitate change on one

or both your parts to come up with a good solution. For example, headphones for a partner who needs to listen to music while working at home when you need quiet is the kind of situation you need to resolve with conversations. These conversations are best had outside of a specific moment of conflict when you can talk about how you want things to be going forward rather than how they are flawed in the moment.

- When someone who isn't yet in tune with your offsite work arrangement interrupts you, it's important to be clear about what you are doing and when you will be free to address their concerns. A good basic response to a family member or friend trying to pull you away from your work is something like: "I would like to spend time with you, too. I work from home from 9 am to 5 pm on Fridays, and my team is counting on me to get through my work when I said I would. I'm free at 6 tonight to catch up." You should change the words to be more personal and true to your voice, but remember to include the following elements in your response:
  - ✓ Show your interest in spending time with them first, so they know it is not a personal rejection.
  - ✓ Provide a clear indication of what your unavailable work times are, so they can avoid coming back later and getting the same message.
  - ✓ Recognize that there are still people expecting to be able to contact you and counting on your productivity to get through their own workdays.
  - ✓ Suggest a time to connect later, so you don't let work distract you from making important personal plans.
- Telework can be a great boon to parents by reducing commutes and providing some additional flexibility around **managing work and child care responsibilities**. It can also be helpful for tending to a sick child who just needs his/her condition monitored throughout the day while resting. However, telework is still work, and combining it with regular child care — especially infant care — is not easy, as work and children can both demand your attention at unexpected moments. While it may be reasonable to take an occasional telework day, with your supervisor's permission, to deal with some minor child care issues, your responsibility to your employer is to be available during the times when you are teleworking. Combining telework and child care is often unfair to your employer, your children and yourself. It is generally best to secure separate child care during work hours, so that you can focus your attention on your work.

### Managing Relationships with Your Manager and Leadership

- **Be proactive with your manager.** Actively share information on a regular basis and choose to err on the side of over informing. It is much better to have your manager say: "I trust in your work. We can scale back the updates" than "I'm worried that I don't know enough about what you are doing. Can you update me more?"

- **Establish a standard method for updating your manager on your progress before you start teleworking.** Include the following in that conversation:
  - ✓ Best method(s) for updates: phone, email, regular in-person meeting when you are onsite, etc.
  - ✓ Best frequency of updates: daily, weekly, biweekly, etc.
  - ✓ Content of updates: timelines, conversations with clients, opportunities and challenges, etc.
  - ✓ Format for the updates e.g., including what you've accomplished this week and what you plan to accomplish next week for each of your major projects. If you need your manager to respond, you can indicate that with highlighting.
- Providing updates can feel like a pointless labor if you don't know how or when you will get feedback on them. Clarifying that up front can ensure that the updates are tools to advance your performance and career. **Determine how and where your manager will give feedback on your updates.** Will it be by reply email, phone or some other method? Is no response the equivalent of agreement? Or is it a sign that communication is breaking down?
- **Ask your manager(s) for their expectations** around:
  - ✓ availability (how quickly you need to respond to email and phone calls)
  - ✓ what happens if you are needed onsite on a regular telework day
  - ✓ best method for short notice contacts
  - ✓ reasonable boundaries for your workday e.g., should you accept a call an hour after your workday officially ends? After two hours? Four?

You should also consider your opinions on these things and whether they align with your manager's perspective. If the two of you don't agree, make sure to have a talk about it as soon as possible to avoid confusion or resentment later.

- **If a sensitive situation emerges** — where you or someone else may have a strong reaction to a situation — **avoid email discussions.** Request a phone or video call to add greater depth to the dialogue. Do this for both positive and negative situations. It will give you the opportunity to head off misunderstandings around bad news. For good news, a call is important to tie you and your contributions to the announcement, helping your manager remember your connection to the good news when performance evaluations come around. Sending a follow-up email with the resolution of your conversation further cements your contribution onto the official record.
- Just because you are not available for your supervisor to pop into your office for an unscheduled chat doesn't mean that you are not still expected to be responsive to impromptu phone calls or emails about the status of your projects and people. **Be ready for an unexpected phone call** by keeping your records organized and your personal logs up to date.



- **Make the effort to describe your successes and challenges to your manager** whenever you get the chance. As a teleworker, you are losing some face time that may affect his/her memory of your contributions. Plan a few key updates to give when you are onsite or during a phone meeting. Consider what kind of accomplishments to mention in meetings with other leaders to expand your network and reputation beyond your manager.
- **When you are onsite, make sure to schedule in-person meetings with your manager(s) and other key leaders and colleagues** you should be getting to know. If you need to deliver something, don't leave it in their box. Drop it by their office in person. Adding the personal touch whenever you are onsite to provide it can help tie your face and identity to the voice they hear on the phone.
- **Remember that your work can still be disrupted by unexpected and important issues that need to be addressed immediately.** Make sure to communicate issues to your manager and other relevant stakeholders, particularly if deadlines or other work processes need to be changed.
- **Remember that these agreements are not set in stone.** You should speak to your manager and other stakeholders in your work whenever you think adjustments can be made that will help one or both of you better achieve your goals.
- **Keep in mind that your manager also has work-life issues of his/her own.** Volunteering to use some of your freed time to help him/her get more time will reinforce the idea that work-flex is a "team sport." When your manager sees that work continues to get done — and both your lives are more successful on and off the job — he/she will be more likely to support telework if the continued existence of the program at your organization ever comes into question.
- **Consider the use of project management software** that can be used collaboratively with your supervisor and colleagues, such as Microsoft OneNote.

#### Managing Relationships with Colleagues and Clients

- **Remember that your teammates are also affected by your telework schedule** and how it interacts with their work-life fit. Encourage mutual feedback on how the team is working together by asking for feedback on your telework. How does it affect them? Do they have the communication options they need to get their work done and to assist you with yours? Do you all have the kind of relationships you need to be collaborative with and be supportive of one another regularly and when things change?

If there are things you or your colleagues can do to help make telework more successful for everyone, discuss how you can make that a reality. Be realistic about whether the requests are easy to put in place. Remember that everyone has his/her own work, personal and family concerns. Solutions that address the interests of all stakeholders will have the greatest chance to be enacted and to endure.

- Just as with your manager, being deliberate with how you communicate (video, phone or email) can help you build better working relationships with your teammates. **Whenever**



**possible, schedule business lunches or coffee meetings to catch up on projects with colleagues** — informal connection time is important in maintaining relationships. A lunch meeting doesn't have to be in person. Though it may feel odd to do so, a video chat at your desk while you and a colleague eat lunch can be a good way to bond across long distances, especially if you otherwise communicate a lot via phone or email.

- **Colleagues in other departments also need to be considered when constructing your communication plans.** Since they are not on your team, they may not receive briefings or memos updating people on the telework process or your schedule. Lacking such information, they are more likely to complain when they need something and you are unavailable, especially if they aren't engaging in some level of telework themselves. Head off future problems by identifying key communication channels between you and other departments. Give them an explanation of how your telework will function and how to get in touch with you. For example, approach people in other departments who make regular requests with short deadlines before your telework starts. Explain the process and ask for their input on what kind of contact options (e.g., phone, email, regular meetings, etc.) and notice of your schedule they need to do their jobs. By involving them in the process from the beginning, you can avoid many future problems. If problems do emerge, having them participate in the initial design of the process will make it easier to persuade them to help you improve on your telework process rather than demanding that telework be ended all together.
- A primary complaint about teleworkers is that they are not available when needed. **It is important to manage your reputation for availability and make sure colleagues, managers and leaders all perceive you as being available when you are scheduled to be available.** Make sure to inform stakeholders in your work if you will be unavailable when they might expect you. Similarly, if you cannot respond promptly to emails and calls, give them a heads up on when you may need a longer time period to respond than usual. That includes times when you take a break, a few hours off for a doctor's appointment or a vacation or if you are going to focus on a deadline and not check email as regularly as you usually do. Make sure to mention these moments widely in staff meetings or to other stakeholders in direct conversations. That way, even if someone is disappointed in your unavailability, another coworker can remind that person that you were scheduled to be off and help reinforce your reputation as responsive even when you are not present.
- **Be patient.** Just because you tell someone you are teleworking next Friday, doesn't mean he/she will clearly remember it when that person has an emergency on that Friday and panics because you are not at your desk. **Give people time to adjust to the new situation and try a number of the communication tips several times before deciding it doesn't work for you.** Often, people need to forget and be reminded a few times before changes in work habits truly stick.

### Professional Development

- Even though you may be physically alone when you telework, you are still very present in the virtual workplace. **Reach out to other teleworkers, whether they are on your team**

**at not.** Use your telework experiences as a way to create networks that can be a source of innovation and ideas, so that teleworkers become a uniquely valued resource of 1) tips and strategies for successful telework at your organization; and 2) mentors and sponsors who are invested and experienced in advancing the development and career options of a teleworking employee.

- **Take the time to develop your own professional development plan.** Create lists of the:
  - ✓ trainings and conferences you need to attend to develop your skills and networks
  - ✓ assignments that you believe would position you for an assignment you really want or a promotion
  - ✓ people to whom you would like to be introduced in organizational leadership
  - ✓ positions you would like to be promoted to over the course of your career

Share these lists with your manager during an in-person meeting, if possible, or during an annual performance review, if there's no other appropriate opportunity to have a career discussion. Revisit this list throughout the following year. If you are not getting the opportunities that you and your manager agree are appropriate, reach out to your manager for guidance or support, as appropriate.

### Common Emotions

Telework is a different emotional experience than working in a collective worksite. The social interactions tend to be shorter, more transactional, more formal and less frequent. That can result in some less positive feelings that you will want to watch out for and defuse.

- **Isolation.** It is very normal for people — especially those who thrive on social interaction — to feel lonely at the end of one or more days of telework. Some methods for countering these feelings are to:
  - ✓ Plan after-work activities that include being around people. Note that just being out around people can be satisfying even if they are not your friends or the interactions are short. A trip to the grocery store or other task in a public place can feel refreshing after a day of working alone.
  - ✓ Use richer communication media for your work interactions, like video chats and phone calls. Interacting with a coworker in real time where you can see a facial expression on your screen or hear them laugh to a joke will be more rewarding than the same exchange on email.
- **Fear of being “out of sight, out of mind.”** You may at times feel like you are being forgotten during the planning of events or your contributions are not getting as much attention as they would if you were onsite. These are real considerations for a teleworker, especially if there are not many teleworkers in your organization. Some things you can do to stay present in your colleagues' minds are:

- ✓ Make sure to set up regular catch-up calls with key contacts onsite. Even if they are short five minute calls, these calls insert your presence into *your colleagues'* routines in a way they will notice and remember.
- ✓ Take every reasonable opportunity to attend major events like celebrations of success, project kickoff meetings and other events that are important or memorable. Even if you could provide the same contribution remotely, your presence will create stronger ties between you and your ideas and contributions to both the work and the culture of your organization.
- ✓ Recruit a meetings advocate who will make it his/her responsibility to mention you and whether you should be included in a meeting. This should be someone with whom you communicate regularly and who understands your contributions to the team. This person should ask anyone calling a spontaneous meeting whether it would be worthwhile to dial you in.
- ✓ When you are included in meetings remotely, make an effort to offer a comment, idea, question or other sign of your involvement. You will need to be more proactive in showing your engagement than if you were present. For example, if you find yourself nodding at someone's idea (which is invisible to the rest of the team), take the moment to voice your agreement. Your voice will often be all anyone can perceive of you in a meeting, so make sure to use it.

#### Evaluating My Success

Don't wait for others to tell you if your telework situation is working for them and the organization. In general, people do not take the time to point out things that are going according to plan. They also tend to avoid mentioning small fixable problems until they have expanded into larger problems with a lot of negative feelings built up. Take the initiative to gauge your own success every few months by:

- ✓ asking your supervisor and coworkers directly whether things are going well and if there are any changes that would make things better;
- ✓ checking in with important stakeholders — like regular customers — to see if they are getting what they need when they need it (a good idea whether you telework or not);
- ✓ looking back through your assignments and make sure they have been completed successfully and in a timely manner;
- ✓ considering whether your technology (computer, phone, access to servers, etc.) meets your present and future needs for communication and data management;
- ✓ confirming that any concerns and or problems you or another stakeholder have raised have been fully resolved in a timely manner; and
- ✓ documenting how your telework has been beneficial for you or the organization (e.g., better customer service, faster response times, less overall stress, etc.).

Clearly, successful telework programs are more involved than simply allowing employees to work remotely. There are health and wellness, communication, performance management, and other considerations that make the difference between having telework and capitalizing on telework.

The preceding tips are a broad overview of the kinds of things the average teleworker should take into account when starting to telework. Though Sections 1 and 2 of [Workflex and Telework Guide: Tips for Anyone to Work Anywhere](#) are written for HR professionals and managers, teleworkers familiar with how to integrate the advice in all three sections of this Guide will be well positioned to use telework to achieve their goals both on and off the job.

# Appendices

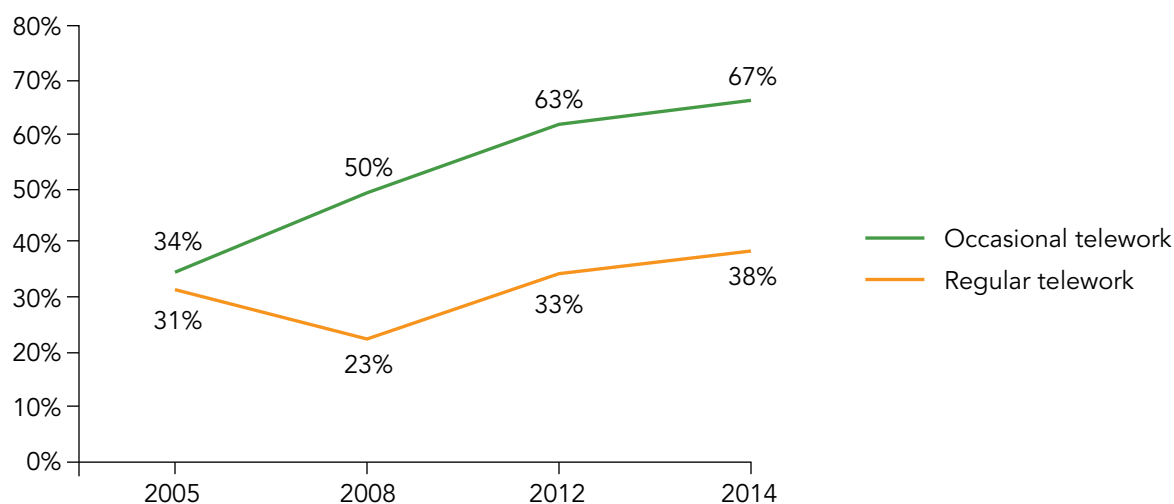


## APPENDIX A: STATISTICS FOR YOUR BUSINESS CASE

### How Common Is Telework?

According to the National Study of Employers,<sup>11</sup> the proportion of U.S. employers with 50 or more employees offering at least some employees access to occasional telework has risen steadily from 34% in 2005 to 67% in 2014. The proportion of employers allowing for regular telework has been more stable, rising slowly between 2005 (31%) and 2014 (38%). Though there was a significant dip in regular full-time telecommuting in 2008 (down to 23%) — likely due to organizations cutting their telework programs in response to the recession — this reduction was reversed and exceeded by 2012. Despite fears that the end of telework at a few big companies — such as Yahoo and Best Buy — was a sign of the coming telework apocalypse, the reality has been much different. The fact that two years after those 2013 announcements, these companies are still used as the primary examples of this anticipated trend only reinforces their status as outliers, not exemplars of the fate of telework across the country.

**Figure 1: Percentage of Employers with Telework Programs: 2005-2014**



Source: 2005, 2008, 2012, 2014 National Study of Employers

### What Is Telework Related to?

#### Productivity

A study by Stanford University at the company Ctrip found a 13% increase in productivity among call center employees engaging in regular telework (four out of five days worked from home).<sup>12</sup> Nine percent of the improvement was due to working more minutes per day (fewer breaks and sick days) and 4% was from more calls per minute (attributed to a quieter and more convenient working environment). When the pilot was expanded to the entire company, the improvement in productivity increased to 22%.

## Savings

There are many expenses incurred by organizations that have worksites large enough to house *all* of their employees *all* day, *every* day. These range from rental or purchase, taxes, and maintenance of real estate, as well as utilities. When employees have far to commute without reliable public transportation, there are additional costs for ensuring sufficient parking and covering travel expenses between far-flung worksites.

- The company Ctrip — which was featured in a Stanford University study on the effects of telework — saved an average of \$1,900 on furniture and space alone.<sup>13</sup>
- Research by Global Workplace Analytics estimates that organizations that engage in high levels of telework can save an average of \$10,000 per full-time telecommuting employee per year due to reduced real estate and electricity costs and improved productivity.<sup>14</sup>
- Commuting is expensive. The average cost of driving a U.S. mile is around 58 cents for a medium sedan, according to studies conducted by AAA<sup>15</sup> and the IRS.<sup>16</sup> That amounts to about \$8,700 a year based on the AAA's standard of 15,000 miles a year of driving. Assuming an average U.S. driving commute of 16 miles each way and 252 business days a year,<sup>17</sup> about half that cost or \$4,677 is a direct result of commuting to and from work. While this value may seem modest to some, for many U.S. lower wage employees, this can consume between 6%-9% of their annual income.<sup>18</sup> Employees — especially lower wage employees who don't have to bear these costs — are very likely to have greater economic security, another component of an effective workplace, without the organization having to invest in higher salaries. Telework allows employers to increase an employee's financial resources — not by paying them more, but by reducing the expenses incurred by working for your organization.

## Opportunity for Increased Motivation and Job Satisfaction

In general, research on job satisfaction has shown that there is a positive relationship between telework and job satisfaction because it gives people the autonomy and flexibility they need to meet their personal life demands.<sup>19</sup> <sup>20</sup> For example, a 2012 survey of over 687,000 government employees conducted by the Office of Personnel Management found that employees who telework had global satisfaction and engagement scores that were seven points higher than their non-teleworking counterparts.<sup>21</sup> Though not every telework situation results in higher satisfaction,<sup>22</sup> following the tips in this Guide is intended to increase the likelihood you will achieve similar results.

## Talent

Telework can open entirely new hiring markets to your recruiters by removing or reducing the obstacles placed by distance, mobility-based disabilities and some conflicting family responsibilities. Either by reducing overall weekly commuting times or by allowing an employee to full-time telecommute, telework makes it possible to cherry pick the best talent from diverse locations without relocation costs for the organization or the employee.

## Absenteeism and Tardiness Levels

Telework can offer employees a wider range of choices about how to get work done in the face of personal emergencies. Mildly ill employees who stay home to avoid infecting colleagues

may want to keep working to take their minds off the discomfort of their illness. Other situations call for an employee to spend a limited amount of time offsite waiting for something to happen (e.g., pipes to be fixed or a delivery) and may want to work during that otherwise unused time. When employees have the option of working instead of using vacation and sick leave, the organization can benefit by having work flow continue unabated.

### Community Relations

Telework can provide a variety of positive effects on communities where there are numerous telework-eligible jobs available.

- Estimates by the Telework Research Network suggest that optimal usage of telework nationwide could reduce greenhouse gases by the equivalent of taking almost 10 million cars off the road.<sup>23</sup>
- On a more local level, another study found that “when compared with non-teleworking, five-day telework scenarios on cooling days<sup>24</sup> in California can have about 50–70% lower total costs.”<sup>25</sup>
- Municipalities can also spend less on maintaining essential infrastructure such as roads, power grids and drainage in city centers due to less concentrated demands on these systems.<sup>26 27</sup>

### Employee Autonomy/Independence

Telework is associated with greater feelings of autonomy among employees who can access it.<sup>28 29</sup> Furthermore, studies by Families and Work Institute (FWI) show that employee autonomy is one of six indicators of an effective workplace, one where job satisfaction, engagement and intent to stay are all high.<sup>30</sup> Employees who have to make or provide significant input into decisions about how, when and where to work are more likely to invest some of their own identity into the results of those decisions, encouraging greater efforts to succeed.

### Employee Health

Another aspect of commutes that profoundly affects the employee and rebounds to the employer is the relationship between health and commuting. The Gallup-Healthways Well-Being Index<sup>31</sup> found that longer commutes are associated with higher reported levels of obesity, cholesterol, pain, fatigue and anxiety. Not only can a reduction in such experiences benefit an employee directly, but also reductions in obesity and other health ailments can have significant effects on health care costs for organizations.<sup>32</sup>

### Improvement in Time Management

Telework can transform time management by removing or reducing considerations such as commuting time between work and other engagements, complications around working across time zones, and unplanned intrusions of other employees into your work schedule. When employees can use time more efficiently, they can both fulfill their work responsibilities and reinvest the additional time in their personal and family lives. Such reinvestment has obvious benefits for the employee, but also helps relieve work-related stress that reduces performance and builds social networks that can lead to additional business opportunities.<sup>33</sup>



## APPENDIX B: TELEWORK APPLICATION TEMPLATES

### Telework Application

Name \_\_\_\_\_

Title \_\_\_\_\_

Department \_\_\_\_\_

Supervisor \_\_\_\_\_

Number of days I would like to telework \_\_\_\_\_

**1) Please describe how you think your job responsibilities are suited for teleworking by responding to the following questions and discussing them with your supervisor.**

- How will telework enable you to perform your job more effectively?
- How will telework positively affect your organization?
- How will your work performance be assessed?
- When will you have a check-in meeting to review your telework arrangement?
- Are there any special circumstances or considerations that should be noted before beginning a telework arrangement and reviewed at the first check-in?

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**2) Describe your proposed teleworking arrangement.** Include: which days you will telework; which days you will be onsite; how often and in what manner you will keep your supervisor and coworkers apprised of your work progress; and any specific supports you believe would make your telework arrangement a success.

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## Supervisor

I have discussed the possibility of teleworking with the above-mentioned employee, and our conversations are accurately reflected in section one of this application. I believe this employee is a good candidate based on job responsibilities and performance in his/her current position.

Supervisor Name \_\_\_\_\_

Supervisor Signature \_\_\_\_\_ Date \_\_\_\_\_

## Telework Applicant

I have discussed teleworking with my supervisor, and our conversations are accurately reflected in section one of this application. I understand that my application does not guarantee that I will be eligible to telework. I have read the teleworking policy and understand that it is not an entitlement and that it is not appropriate for every employee. I understand that teleworking can be terminated at any time by [Organization] or by me.

I understand and acknowledge that [Insert additional policy acknowledgements here.]

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

Teleworking Applicant's Name \_\_\_\_\_

Teleworking Applicant's Signature \_\_\_\_\_ Date \_\_\_\_\_

## Human Resources

Approval ☐ Disapproval ☐

Reason \_\_\_\_\_

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

HR Contact Name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

The telework application is a basic template that can be tailored to match your organization's needs. For example, you may want to include things like:

- a listing of your organization's policies on telework and a signature indicating understanding and agreement to abide by those policies
- a listing of the original schedule and the new schedule
- technology used to facilitate the telework
- schedule for regular onsite visits
- acceptable locations for teleworking (e.g., home, but not a coffee shop)
- any other policy, provision or aspect of the agreement that the organization, the manager or the employee feels should be put in writing

## APPENDIX C: HELPFUL LINKS

The following links can provide you additional examples of telework forms and tips to enhance your organization's specific telework tools.

**SHRM Workplace Flexibility: Telework and Full-time Telecommuting Resource Webpage**

<http://www.shrm.org/hrdisciplines/benefits/articles/pages/wl-telework.aspx>

**USDA Telework Agreement**

[http://www.dm.usda.gov/employ/worklife/telework/docs/sample\\_telework\\_agreement.pdf](http://www.dm.usda.gov/employ/worklife/telework/docs/sample_telework_agreement.pdf)

**Department of Defense (DOD) Telework Guide**

[http://www.gordon.army.mil/cpac/cpac/telework\\_guide.pdf](http://www.gordon.army.mil/cpac/cpac/telework_guide.pdf)

**Office of Personnel Management Telework Guide**

[http://www.telework.gov/guidance\\_and\\_legislation/telework\\_guide/telework\\_guide.pdf](http://www.telework.gov/guidance_and_legislation/telework_guide/telework_guide.pdf)

**Telework.gov Resource Guide**

<https://www.telework.gov/>

**Cornell University Telework Request Form**

<http://blogs.cornell.edu/flexibility/discussion-request-form>

**Cornell University Telework Agreement**

[https://www.hr.cornell.edu/life/support/flex\\_wellness\\_agreement.pdf](https://www.hr.cornell.edu/life/support/flex_wellness_agreement.pdf)

**Teleworking and the Non-Exempt Worker: Four Tips for Minimizing FLSA Issues**

<http://blog.shrm.org/blog/teleworking-and-the-non-exempt-worker-four-4-tips-for-minimizing-flsa-issue>



**Families and Work Institute (FWI)** is a nonprofit research-to-action institute dedicated to providing research for living in today's changing workplace, changing family and changing community. Since the Institute was founded in 1989, our work has addressed issues in three major areas: the workforce/workplace, youth and early childhood. Families and Work Institute's research takes on emerging issues before they crest and includes some of the most comprehensive research on the U.S. workforce available. The Institute's work has helped change the language of debates to move the discussion forward toward more effective and data-driven solutions and to result in action. In addition, because the Institute conducts some of the only research studies of their kind, our studies are quoted in the media more than once a day and are regularly cited by decision makers in business, government and the public. Visit [FamiliesAndWork.org](http://FamiliesAndWork.org), follow us on [Linkedin.com/company/families-and-work-institute](https://www.linkedin.com/company/families-and-work-institute), like us on [Facebook.com/FWInews](https://www.facebook.com/FWInews) and follow us on [Twitter.com/FWInews](https://twitter.com/FWInews).



Founded in 1948, the **Society for Human Resource Management (SHRM)** is the world's largest HR membership organization devoted to human resource management. Representing more than 275,000 members in over 160 countries, the Society is the leading provider of resources to serve the needs of HR professionals and advance the professional practice of human resource management. SHRM has more than 575 affiliated chapters within the United States and subsidiary offices in China, India and United Arab Emirates. Visit SHRM at [shrm.org](http://shrm.org) and follow us on [Twitter.com/SHRMPress](https://twitter.com/SHRMPress).



**When Work Works (WWW)**, a project of Families and Work Institute and the Society for Human Resource Management, is a nationwide initiative to bring research on workplace effectiveness and flexibility into community and business practice. Since its inception in 2005, When Work Works has partnered with an ever-expanding cohort of communities from around the country to:

- share rigorous research and employer best practices on workplace effectiveness and flexibility;
- recognize exemplary employers through the When Work Works Award; and
- inspire positive change so that increasing numbers of employers understand how effective and flexible workplaces can benefit both business and employees.

Visit [WhenWorkWorks.org](http://WhenWorkWorks.org) and join the workflex conversation by following us on Twitter: [@WhenWorkWorks](https://twitter.com/WhenWorkWorks), [@FWInews](https://twitter.com/FWInews) and [@SHRMPress](https://twitter.com/SHRMPress).

## ENDNOTES

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# You Can **#ReinventWork** by Creating an Effective and Flexible Workplace!

**Simply** check out the free resources from **When Work Works** (WWW). This national initiative promotes workplace strategies that enable people to do their best work.



The **When Work Works Award** is a prestigious worksite specific award which recognizes model U.S. employers of all types and sizes for their [effective and flexible workplace](#) practices. All applicants receive a free, customized benchmarking report comparing their workplace practices to a nationally representative sample of U.S. employers and to the Award winners. Winning sites receive local and national recognition as top employers. There is no fee to apply. For details, go to: [WhenWorkWorks.org/about-the-award](http://WhenWorkWorks.org/about-the-award).



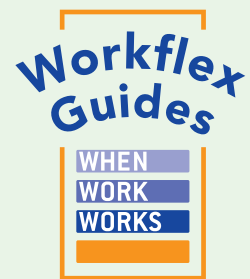
## Best-Practices Searchable Tool:

Winners of the WWW Award are included in this national database where employees can look for the best employers. This tool also includes promising and innovative practices on what winning employers in your industry or region are doing. Go to: [WhenWorkWorks.org/search-recipient](http://WhenWorkWorks.org/search-recipient).



## Effective Workplace Model:

Share this model within your organization so everyone—from hourly employees to executives—can keep these six components in mind if they want to create a win-win for employees and the bottom line. Go to: [WhenWorkWorks.org/be-effective/guides-tools/what-is-an-effective-workplace](http://WhenWorkWorks.org/be-effective/guides-tools/what-is-an-effective-workplace).



**Workflex Guides:** This new series is your go-to-resource on how work-life fit and flexible work are possible. Recently released, [Workflex and Manufacturing Guide: More Than a Dream](#), includes real examples straight from factory floors. Available in the fall of 2015, the Workflex and Telework Guide will help employers and HR professionals consider when telework works for their organization and employees. Go to: [WhenWorkWorks.org/be-effective/guides-tools/workflex-guides](http://WhenWorkWorks.org/be-effective/guides-tools/workflex-guides).

## WHEN WORK WORKS

A PARTNERSHIP BETWEEN

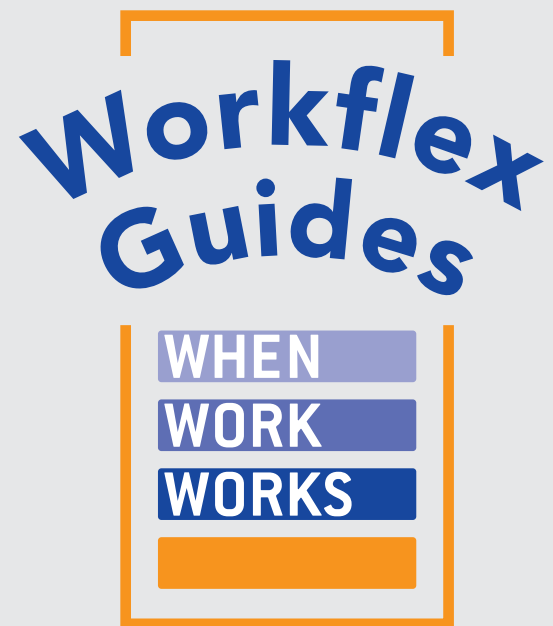


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**BRINGING RESEARCH ON WORKPLACE EFFECTIVENESS AND FLEXIBILITY INTO BUSINESS AND COMMUNITY PRACTICE**



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