

IMPLEMENTING FLEXIBLE WORK:

# TELEWORK, COMPRESSED WORK, AND FLEXIBLE WORK PROGRAMS



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# INTRODUCING FLEXIBLE WORK: TELEWORK, COMPRESSED WORK, AND FLEXIBLE SCHEDULE PROGRAMS

For many people, the nature of work has evolved into something that they do, rather than somewhere they go. Technological advances allow many workers the option to do their jobs outside of a traditional office location and outside of normal business hours. Telecommuting by employees has grown by 115 percent in ten years. In 2016, 43 percent of U.S. workers worked remotely at least occasionally, up from 9 percent in 2007.<sup>1</sup>

Recognizing the demands of current and future employees, this guide summarizes a spectrum of flexible work opportunities that require varying degrees of complexity, investment, planning, management, and scheduling. Information provided includes action steps for workplace implementation, case studies to serve as examples, and sample documents and templates that can be adapted for any worksite.



*\*These resources are provided as guidance for implementing an employer-based commute options program, and they do not represent a requirement to provide such a program.*

# DEFINING TERMS

**Flexible Work:** An umbrella term that captures the broad spectrum of alternative work arrangements such as flexible start/end times, compressed work weeks, telework, or anything beyond the traditional “9-5” office-based working day.

**Telework/Telecommute/Remote Work:**

Interchangeable terms that refer to working on traditional office-based tasks in a non-office location. A non-office location is usually an employee’s home, but can also be a satellite office location, co-working space, or even an informal work space like a coffee shop or library.

**Flex Schedules:** The adjustment of working hours to allow for earlier or later start and end times.

**Compressed Work Week:** The practice of reducing the number of days worked in a standard work week by increasing the hours worked during select days of the week; for example, working four, ten-hour days in place of five, eight-hour days.



# BEST PRACTICES OVERVIEW: WHAT DO GOOD FLEXIBLE WORK PROGRAMS HAVE IN COMMON?

Flexible work programs offer significant benefits to both employers and staff, but require thoughtful planning, implementation, and monitoring to ensure effectiveness. Organizations that maintain successful flexible work programs share a number of core elements that can serve as general “best practice” ideas.

## Employee Selection

Flexible work is not suitable for all workplaces or all employees. Furthermore, flexible work options may vary based on the needs of/suitability to particular staff. Some positions require a physical presence at the worksite, particularly roles requiring equipment use or in-person interaction with customers/clients/patients. Identifying staff eligibility, management challenges, performance standards, as well as potential risks for specific flexible work offerings will build the foundation for a strong program.

### *Individual employee criteria to consider:*

- Performance
- Staff role
- Type of information handled
- Technological requirements
- Familiarity with job responsibilities
- Level of necessary in-person interaction
- Supervisory responsibilities
- Home office environment
- Work style
- Seniority
- Tenure

### **Case Study: Centers for Disease Control and Prevention (CDC), Atlanta, GA**

As a federal agency, the CDC is subject to extensive federal personnel policies. Some policies are set by legislative mandate, including the Telework Enhancement Act of 2010, which specifies expectations, responsibilities, eligibility, implementation requirements, and policy content for all federal agencies. The resulting governance framework has guided the CDC during its telework program development. Within its policy, the CDC identifies which roles are eligible for part- or full-time telework, breaking eligible roles out into three classes of eligibility: Core, Extended, and Situational. Core teleworkers (24 percent of personnel) work remotely one or two days per week. Extended teleworkers (35 percent of personnel) work remotely on a regular basis (three or more days per week) and include both remote and mobile positions. Situational teleworkers are limited to occasional or non-routine remote work. Eligibility criteria are based on work type, security considerations, and necessary technology. Eligibility does not entail immediate participation as employees must complete a corresponding telework agreement.

Individual employee eligibility criteria, along with the overall approval process, should be clearly summarized within a flexible work policy. It is common practice for employees to fill out an application form that allows management to assess case-by-case suitability for flexible work. Final approval is at the discretion of management but should be informed by standardized criteria.

## Policy Creation

Setting formal, comprehensive policies for flexible work programs ensures that management and staff understand all available flexible work options, how the options apply to their position, and who can access them. A strong policy includes clear rules as well as guidelines for participant evaluation and accountability.

Contrastingly, informal flexible work options can be revoked at a manager's discretion or as management changes which can lead to uncertainty that hampers participation or results in confusion regarding rules. Informal policies may allow for easier implementation, but may create a lack of consistency that can result in long-term management issues. While an informal policy may give managers flexibility to assess whether employees are sufficiently self-directed and capable of engaging in a flexible work program, it does not sufficiently manage expectations from the outset. An effective policy must include a clear process in order to remain effective.

### Key Elements of a Flexible Work Policy

- Workplace-specific definitions of key terms (flexible, telework, compressed work week, etc.)
- Eligibility
- Management roles and responsibilities
- Staff roles and responsibilities
- Number of days permitted (per week, per month, etc.)
- Monitoring and evaluation
- Process for removal from program
- Technology requirements, allowances, and provisions

### Case Study: Portland State University (PSU), Portland, OR

PSU has an established telecommuting policy that recognizes the value of telework and is endorsed by senior management. Created and administered by human resources within the finance and administration department, the policy provides both high level direction to managers regarding policy implementation, and detailed information for employees that clarifies their responsibilities. The policy outlines rules and restrictions and includes directions to the program application form.

More details:  
<https://www.pdx.edu/hr/telecommuting-policy>

## Education and Training

Flexible work (and telework in particular) warrants employee training in order to maintain understanding, consistency, and address questions/concerns. Training, when provided to both employees and their managers, can reduce obstacles, conflicts, and misunderstandings that may otherwise be inherent to flexible work. Training may need to take place across a number of sessions.

### Employee Training

Training for employees should focus on the practicalities of working independently and remotely, performance expectations, and identification of roles and responsibilities. Training sessions should cover the following core elements:

- Work performance expectations
- Communications expectations
- Technical set-up (may be job-specific)
- Telework-specific software training
- Creation of a workspace
- Performance management process

Whenever possible, training should be delivered in person, but also made available in a format that can be reviewed by an employee at a later date. As part of the training process, employees should be given the opportunity to ask questions, clarify expectations, and identify potential issues and/or concerns.



## Manager Training

Manager training is as important as employee training. Managers are likely to have concerns about managing flexible staff, particularly in terms of performance implications, achievement of deliverables, and team dynamics. For staff working fewer traditional hours or compressed work weeks, concerns may arise regarding the monitoring of in-office performance outside of regular office hours. Ineffective management can significantly undermine the success of a flexible work program, so a management training program should aim to provide managers with the tools they need to effectively manage staff while remaining confident that business operations will not be negatively impacted.

Manager training sessions should cover the following core elements:

- Identifying staff suitability for flexible work
- Setting expectations
- Monitoring and evaluating performance
- Approaches to communication
- Supporting team dynamics
- Integrating remote and non-remote employees

Manager training should be conducted in person and provide additional resources that can be reviewed and referenced at a later date. Joint training sessions or discussion forums held between managers and employees may be valuable prior to launching the flexible work program so that any unresolved and/or unanticipated issues can be addressed.

All employee and manager training should be conducted by a third party via one of the following options:

1. Internal to the organization - for example, the Human Resources team, or
2. External to the organization - for example, a flexible work or organizational management specialist.

### Case Study: U.S. Office of Personnel Management (OPM), Washington, D.C.

The OPM has led the way in the development and delivery of training for federal employees wishing to be considered for telework. Through their public telework.gov website, employees and managers can access a range of training materials, including online training courses. Employee training covers the principles of telework, the suitability of an individual to telework, and the logistics of setting up a home office. Manager training covers similar ground from a management perspective, with a focus on organizational impacts. The online courses include quizzes to assess learning and identify gaps. Federal employees wishing to telework are required to take this training before working from home.

## Piloting

The mere thought of flexible work programs - in particular, telework programs - can create a range of concerns, uncertainties, and perceived risks within an organization that may prevent the introduction of any such program. Many organizations choose to 'test' the practicalities of flexible work by piloting a program with a small group of employees or a single team of staff.

### **The Value of a Pilot Program**

A flexible work pilot program provides an opportunity to test its various elements, from policy development and participant selection to technology solutions and performance management. A pilot can help refine the scope and requirements of a flexible work program while identifying gaps or challenges before the program is fully implemented. It also allows employees to share their thoughts and concerns, ultimately determining if this kind of programming meets their needs. Finally, a pilot program trial run requires fewer resources than a full-scale program so the impacts of any emerging problems are much less significant.

### **Establishing a Pilot Program**

Developing a pilot flexible work program is much like developing a full-scale program, but may be done more quickly, with fewer required approvals and formal processes. Key steps in establishing a pilot program may include:

#### **Step One: Identify Participants**

A pilot will work with a small group of staff from the same department or from a range of teams.

#### **Step Two: Identify Pilot Period**

A strong pilot program is implemented over a long enough time period to test all elements of the program sufficiently while encompassing as many variables as possible: for example, seasonal changes in workload, vacations, and performance review periods.

#### **Step Three: Create Basic Policy**

Establish 'rules of engagement' for participants.

#### **Step Four: Establish Technology Solutions**

Effective flexible work relies on the right technology. The pilot stage provides an opportunity to work with existing technology as well as to identify future needs for a larger program. During a pilot program, existing technology tools are used (email, Virtual Private Network [VPN], cloud-based file storage) and assessed for viability to help inform future scaling up of the program.

#### **Step Five: Training**

A strong pilot program requires participating staff (including managers) to complete a training process that includes a participant review component of the training itself. Participant feedback allows the training to be refined for ongoing use.

#### **Step Six: Evaluation and Monitoring**

A strong pilot program incorporates an evaluation component to capture any successes, challenges, and learnings. Evaluation may entail employee check-ins, performance management metrics, surveys, and focus groups. The goal is to determine if a flexible work program is feasible for the wider organization and, if so, what refinements and resources are needed to make it sustainable. Results of the evaluation can offer a proof-of-concept when seeking approval from upper management or other concerned employees.

#### **Step Seven: Reporting Structure**

A successful pilot program identifies a clear reporting path to communicate the results of evaluation, in a useful manner, to the right decision makers. This may mean understanding the decision-makers' vision of a successful pilot program and tailoring evaluation and reporting to meet that vision.

## What to Test

A flexible work pilot program allows a workplace to test each element of the program as well as to test different approaches and associated processes that build that program.

At a minimum, a well-designed pilot program tests the following:

- Staff selection process
- Staff and management training
- Staff productivity
- Staff monitoring
- Performance management
- Technology approaches
- Data handling and security
- Communication channels
- Policy efficacy

### Case Study: Nestle, Ontario, Canada

Nestle deployed a small scale telework program to identify the potential benefits it could offer the organization while testing employee and manager reactions. A telework policy was created, staff received training, and the pilot program was launched. A group of eight participants were selected to have their experiences closely tracked across a three-month period. Two focus groups covering two timeframes were created to track the experiences of employees and managers:

1. The first two weeks of the pilot and
2. The first six weeks of the pilot.

Participants were asked to gauge their experiences and to identify emerging issues. Participants also discussed impacts on their work and home life while highlighting program improvement opportunities. Some of these opportunities were implemented immediately; others were noted for future improvements. At the conclusion of the pilot project, participants assessed pilot success and lessons learned. The results of this analysis contributed to a report that outlined how the telework program can be expanded across the company.

## Technology

Sophisticated and diverse technology continues to increase flexible working options in a variety of work environments. The smartphone alone allows work to happen almost anywhere and cloud-based computing has broken down still more barriers to teleworking. As such, telework program planning must entail a solid understanding of existing technology capacity for both present and future program needs. The discussion of flexible work technology should be led by the needs of the organization and employees, rather than the technology available. Existing technology can then be reviewed to determine if and how it meets those needs, along with additional tools to fill any gaps.

Technology needs can be assessed using the following task categories:

- **Work tasks:** These tasks are specific to an employee's role. What specific technology needs does an individual require? It may simply be email and the regular suite of Microsoft Office tools, or there may be software particular to a role or industry that is required for an employee to complete work outside of the office.
- **Communication tasks:** These tasks are related to employees' internal and external communication. Technology needs may include instant messaging, phone calls, video-conferencing, screen sharing, and more.
- **Performance management tasks:** These tasks are used to monitor performance. Technology requirements may include time tracking, assignment submissions, and performance reviews.

Security and the protection of data are primary concerns for many organizations considering flexible work and its impact on the movement of work products from the office to the home. Security tools that best meet organizational needs can be identified and provided to telework employees in the form of company-owned computers that feature the same security software, settings, and technical support as in-office employees' computers. This will help to protect specific types of data (for example customer financial information) while maintaining technological compatibility and consistency across the company. As such, it is important that IT professionals are part of the flexible work program planning.

### Case Study: Drew Eckl Farnham, Atlanta, GA

A law firm with over 200 staff members, Drew Eckl Farnham, instituted a telework program in which 24 employees participated. Clear guidelines articulated the program's technology requirements for participants. Two key technology pieces were required: 1) employees had to confirm access to a high speed internet connection at home that allowed them to connect to company servers and 2) a Virtual Private Network (VPN) was provided through Citrix to allow seamless access to company files and software. The program reported a high level of success, with both employees and managers noting an increase in productivity. Additionally, employees realized significant savings in commute times: on average, over eighty minutes each day.

## Monitoring and Performance Management

One of the most prominent and consistent concerns regarding flexible work, particularly from managers, is the ability to remotely manage staff. In an office environment, physical presence plays a large role in monitoring performance. When this type of oversight is removed (either by the employee working outside of regular hours or working at home), there is a perception that performance cannot be monitored and will ultimately decline. A robust, consistent, output-focused performance management process must be implemented to counter such concerns.

### ***Core Elements of Performance Management for Flexible Workers***

- Clearly identified, output-focused performance metrics
- Focus on deliverables and timelines
- Regular and defined check-in times
- Formalized check-in structure to measure performance against output metrics

Performance monitoring may happen more frequently in the initial stages of a flexible work program to ensure that staff and managers are comfortable in their new roles. Regular check-in times can help to keep the staff on target as they acclimate to a new working style and learn to create opportunities to adapt the program as necessary.

# FROM UNDERSTANDING TO IMPLEMENTING: TOOLS FOR BUILDING A FLEXIBLE WORK PROGRAM

The following resources support the development and implementation of a flexible work program. These resources are designed to serve as templates that can be adapted to meet the specific needs of your organization.

1. Sample Telework Policy Template
2. Sample Compressed Work Week Policy Template
3. Sample Flexible Schedule Policy Template
4. Sample Telework Implementation Plan
5. Sample Participant Selection Application
6. Sample Telework Technology & Facility Checklists

## Useful Websites

Additional information, resources, and case studies can be found on the following websites:

[www.telework.gov](http://www.telework.gov)  
<https://globalworkplaceanalytics.com/>  
<https://www.pdx.edu/hr/telecommuting-policy>  
<http://www.teleworktoolkit.com/>

# POLICY EXAMPLES



# SAMPLE TELEWORK POLICY TEMPLATE

Teleworking—or telecommuting—is the concept of working from home or another location on a full-time or part-time basis. [Company Name] offers this work alternative when it makes sense for both the Employer and the employee.

Teleworking is not a formal, universal employee benefit. Rather, it is an alternative method of meeting business needs. [Company Name] has the right to refuse to make teleworking available to an employee and to terminate a teleworking arrangement at any time. Employees are not required to telework. Employees have the right to refuse to telework if the option is made available.

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

## Eligibility

Each [Company Name] Senior Management Team Member (or designee) will identify those job positions in his or her business line that are eligible for teleworking.

The opportunity to telework as well as decisions around continuing or discontinuing teleworking will be made by those managers designated by the appropriate Senior Management Team Member in consultation with Human Resources.

Selection of employees to participate in the teleworking program shall be based on specific, written, work-related criteria including:

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

An employee that is considered for teleworking must be able to work independently and demonstrate skills managing time in a productive manner. Individuals requesting formal telecommuting arrangements must have been employed with [Company Name] for a minimum of 12 months of continuous, regular employment and must have exhibited above-average performance, in accordance with the company's performance appraisal process. The resources that an employee needs to do his/her job must be easily transportable or available electronically.

Eligibility and suitability of employees to participate in teleworking will vary among departments and business units, depending on the function and responsibilities of the employee. Each department must maintain some minimum complement of employees who work onsite at the [Company Name] office in order to function effectively.

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

## Schedules and Hours

Telework hours may be different from office work hours; however, teleworkers and their managers must agree on the designated work hours. A regular teleworking schedule, including specific days and hours, must be established by the teleworker and approved by the manager. The amount of time the teleworker is expected to work per day or per pay period will not change due to participation in the teleworking program.

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

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

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

## Workspace

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

[Company Name]'s liability for job-related accidents will continue to exist during the approved work schedule and in the teleworker's designated work location since the teleworker's work space is an extension of the [Company Name] workspace. The designated work location must meet OSHA safety rules for the workplace, including: smoke detector, working fire extinguisher, clearly seen and unobstructed exits, removal of hazards that may cause falls or injury, adequate electrical circuitry, and appropriate furniture. If an at-home injury occurs, the teleworker must notify his/her supervisor

immediately and follow [Company Name] policy for on-the-job injury. The teleworker must agree to follow common safety practices and provide a safe work area for the employee and others who enter it.

Homeowner's insurance and any changes in rates or coverage are the responsibility of the employee. Any increases in the teleworker's home utility costs are the responsibility of the employee.

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

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

## Equipment and Supplies

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

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

[Company Name] will reimburse teleworkers for other business-related expenses, such as long- distance phone calls, shipping costs, etc. that are reasonably incurred in accordance with job responsibilities and approved by the supervisor in accordance with [Company Name]'s regular policies. Appropriate documentation is required if such expenses are submitted for reimbursement.

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

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

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

## Employee Access and Availability

Teleworkers must be available by telephone or email during scheduled hours, with the exception of their scheduled lunch period. An appropriate level of communication between the telecommuter and supervisor will be agreed to as part of the planning process and will be more formal during the trial period. After conclusion of the trial period, the manager and telecommuter will communicate at a level consistent with employees working at the office or in a manner and frequency that seems appropriate for the job and the individuals involved.

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

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

## Security

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

Teleworkers agree to allow an authorized [Company Name] representative access to the home work area during prearranged times for business purposes as deemed necessary by the supervisor, including safety inspections, equipment installations and repairs, security assurance, retrieval of [Company Name] property, and performance evaluations. To ensure hardware and software security, all software used for teleworking must be approved by the supervisor prior to installation. All software used for teleworking must be virus inspected and each PC must have virus protection software installed.

## Liability

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

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

## Income Tax

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

## Application Process

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

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

Teleworking arrangements will be on a trial basis for the first three months and may be discontinued at any time. If a teleworking arrangement is discontinued by [Company Name], every effort will be made to provide notice to the employee. There may be instances, however, when no notice is possible.

Employees who are teleworking at the time this policy is adopted will be permitted to continue teleworking.

## Evaluation

Teleworkers will participate in all studies and reports relating to this program.

Evaluation of telecommuter performance will focus on work output and completion of objectives rather than on time-based performance.

## Termination

The availability of telecommuting as a flexible work arrangement for employees of [Company Name] can be discontinued at any time at the discretion of the employer. Every effort will be made to provide 30 days notice of such a change to accommodate commuting, child care, and other problems that may arise from such a change. There may be instances, however, when no notice is possible.

## TELEWORK AGREEMENT FORM (EMPLOYEE)

This Agreement, effective \_\_\_\_\_, is between \_\_\_\_\_ (referred to as "Employee") and \_\_\_\_\_ (referred to as "Employer").

The parties, intending to be legally bound, agree as follows:

**Scope of Agreement** - Employee agrees to perform services for Employer as "teleworker." Employee agrees that teleworking is voluntary and may be terminated at any time, by either the Employee or Employer, with or without cause.

**Term of Agreement** - This Agreement shall become effective as of the date written above, and shall remain in full force and effect, as long as Employee teleworks, unless the agreement is terminated.

**Termination of Agreement** - Employee's participation as a teleworker is entirely voluntary. Teleworking is available only to eligible employees, at Employer's sole discretion. Teleworking is not intended to be available to the entire organization. As such, no employee is entitled to, or guaranteed, the opportunity to telework. Either party may terminate Employee's participation in the program, with or without cause, upon reasonable notice, in writing, to the other party. Employer will not be held responsible for costs, damages, or losses resulting from cessation of participation in the teleworking program. This Agreement is not a contract of employment and may not be construed as such.

**Salary, Job Responsibilities, Benefits** - Salary, job responsibilities, and benefits will not change because of involvement in the program, except as they might have changed had Employee stayed in the office full-time, e.g., regular salary reviews will occur as scheduled, and Employee will be entitled to any companywide benefits changes that may be implemented. Employee agrees to comply with all existing job requirements now in effect in the office.

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

**Work Schedule** - The daily work schedule for the days working at home is subject to negotiation with and approval by Employee's manager. The manager may require that Employee work certain "core hours" and be accessible by telephone during those hours.

**Equipment** - Employer may provide the necessary computer, software, and other equipment needed for teleworking. All of these items remain the property of the Employer and must be returned to the company upon request. The computer, software, and any other equipment or supplies provided by Employer are provided for use on organizational assignments. Other household members or anyone else should not use the equipment and software. Employer-owned software may not be duplicated except as formally authorized. The employer will be responsible for insurance and maintenance of all company-provided materials.

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

**Workspace** - Employee agrees to designate a workspace within Employee's remote work location for placement and installation of equipment to be used while teleworking. Employee agrees to maintain this workspace in a safe condition, free from hazards and other dangers to Employee and equipment. Employer must approve the site chosen as

Employee's remote workspace. Employee is expected to submit three photos of the home workspace to management prior to implementation. Any employer-owned or provided materials taken home should be kept in the designated work area at home and not be made accessible to others.

Employee agrees that Employer can make on-site visits (with 48 hours advance notice) to the remote work location for the purpose of determining that the site is safe and free from hazards, and to maintain, repair, inspect, or retrieve employer-owned equipment, software, data or supplies. In the event that legal action is required to regain possession of Employer-owned equipment, software, or supplies, Employee agrees to pay all costs incurred by Employer, including attorney's fees, should Employer prevail.

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

**Worker's Compensation** - Employer will be responsible for any work-related injuries under our state's Workers Compensation laws, but this liability is limited to injuries resulting directly from work and only if the injury occurs in the designated work area. Any claims will be handled according to the normal procedure for Worker's Compensation claims.

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

**Dependent Care** - Teleworking is not a substitute for dependent care. Teleworkers will not be available during company core hours to provide dependent care.

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

**Evaluation** - Employee agrees to participate in all studies, inquiries, reports and analyses relating to this program.

Employee remains obligated to comply with all of Employer's rules, practices, instructions and this Agreement. Employee understands that violation of any of the above may result in preclusion from teleworking.

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

Employee: \_\_\_\_\_  
Date: \_\_\_\_\_

Supervisor: \_\_\_\_\_  
Date: \_\_\_\_\_

# SAMPLE COMPRESSED WORK SCHEDULE POLICY TEMPLATE

A compressed work schedule allows employees to complete the 80-hour biweekly pay period in less than the standard 10 workdays. [Company Name] offers this work alternative when it makes sense for both [Company Name] and the employees.

A compressed work schedule is not a formal, universal employee benefit. Rather, it is an alternative method of meeting business needs. [Company Name] has the right to refuse a compressed schedule to an employee and to terminate a compressed work arrangement at any time. Employees are not required to work compressed schedules. Employees have the right to refuse to work a compressed schedule if the option is made available.

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

## Eligibility

Each [Company Name] Senior Management Team Member (or designee) will identify those job positions in his or her business line that are eligible for compressed schedules.

The opportunity for compressed schedules as well as decisions around continuing or discontinuing compressed work schedules will be made by those managers designated by the appropriate Senior Management Team Member in consultation with Human Resources.

## Compressed Work Schedule Options

The standard workweek for a compressed work schedule is Monday through Friday. Employees working a 4/10 or 9/80 must account for 80 hours in each biweekly pay period.

4/10 is a type of compressed work schedule in which an employee meets the 80-hour work requirement by working four 10-hour days and has a day off each week of the bi-weekly pay period, plus the established lunch period of the Office. The hours worked each day are consecutive, except for the intervening lunch period.

The 9/80 is comprised of one 36-hour week, consisting of four 9-hour workdays plus a day off, AND one 44-hour week, consisting of four 9-hour days and one 8-hour day (in the opposite week), PLUS the established lunch period of the Office. The hours worked each day are consecutive, except for the intervening lunch period.

Eligibility and suitability of employees to participate in a compressed work week schedule will vary among departments and business units, depending on the function and responsibilities of the employee.

## Schedules and Hours

Arrival times for compressed work schedules are pre-selected and pre-approved. Overtime hours must be pre-approved in writing by the employee's manager. Deviations from the agreed upon schedule must be approved in advance by the manager. [Company Name] policy will be followed for all absences.

When a holiday falls on the day that is a scheduled day off for an employee on a 4/10 or 9/80 compressed schedule, the in-lieu-of holiday shall be the workday immediately before the holiday.

When an employee requests PTO or uses sick leave, the same number of hours that would have been worked that day will be deducted.

## Termination

The availability of compressed schedules as a flexible work arrangement for employees of [Company Name] can be discontinued at any time at the discretion of [Company Name]. Every effort will be made to provide 30 days' notice of such a change to accommodate commuting, child care and other problems that may arise from such a change. There may be instances, however, when no notice is possible.

## COMPRESSED WORK SCHEDULE AGREEMENT (EMPLOYEE)

This Agreement, effective \_\_\_\_\_, is between \_\_\_\_\_ (referred to as "Employee") and \_\_\_\_\_ (referred to as "Employer").

The parties, intending to be legally bound, agree as follows:

**Scope of Agreement** - Employee agrees to perform services for Employer as "compressed worker." Employee agrees that a compressed work schedule is voluntary and may be terminated at any time, by either the Employee or Employer, with or without cause.

**Term of Agreement** - This Agreement shall become effective as of the date written above, and shall remain in full force and effect, as long as Employee works a compressed schedule, unless the agreement is terminated.

**Termination of Agreement** - Employee's participation as a compressed worker is entirely voluntary. Compressed schedules are available only to eligible employees, at Employer's sole discretion. Compressed work is not intended to be available to the entire organization. As such, no employee is entitled to, or guaranteed the opportunity to, work a compressed schedule. Either party may terminate Employee's participation in the program, with or without cause, upon reasonable notice, in writing, to the other party. Employer will not be held responsible for costs, damages or losses resulting from cessation of participation in the compressed work schedule program. This Agreement is not a contract of employment and may not be construed as such.

**Salary, Job Responsibilities, Benefits** - Salary, job responsibilities, and benefits will not change because of involvement in the program, and Employee will be entitled to any company-wide benefits changes that may be implemented. Employee agrees to comply with all existing job requirements now in effect in the office.

**Work hours, Overtime, Vacation** - Work hours will change based on the approved compressed work schedule, but the compressed worker will maintain an 80-hour biweekly pay period. In the event that overtime is anticipated, this must be discussed and approved in advance with the manager, just as any overtime scheduling would normally have to be approved. Vacation requested will reflect a deduction of PTO hours based on the amount of time that would have been worked that day.

**Evaluation** - Employee agrees to participate in all studies, inquiries, reports and analyses relating to this program.

Employee remains obligated to comply with all of Employer's rules, practices, instructions and this Agreement. Employee understands that violation of any of the above may result in preclusion from working a compressed schedule.

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

Employee: \_\_\_\_\_

Date: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Date: \_\_\_\_\_

# SAMPLE FLEXIBLE SCHEDULE POLICY TEMPLATE

Flexible work hours allow employees to shift start and end times of the workday to avoid peak commute times and increase coverage of service hours for clients and customers. Flexible schedules often involve a service hours schedule as well as a core business hours schedule to guarantee that a department maintains coverage of business hours necessary to maintain delivery of business objectives.

## Eligibility

Each **[Company Name]** Senior Management Team Member (or designee) will identify those job positions in his or her business line that are eligible for flexible work hours.

The opportunity for flexible work hours as well as decisions around continuing or discontinuing these schedules will be made by those managers designated by the appropriate Senior Management Team Member in consultation with Human Resources.

## Flexible Work Schedule Options

Once the standard business hours for **[Company Name]** or department are defined, core business hours should also be determined. Employees may elect an 8-hour shift within the standard business hours timeframe that also supports the core business hours. It is the responsibility of the Senior Management Team to guarantee ample service coverage for the standard business hours within each business line.

# PILOT IMPLEMENTATION



# SAMPLE TELEWORK IMPLEMENTATION PLAN

Implementation of a telework pilot project is similar to the implementation of a full program. Follow these steps to launch a pilot program or expand an existing program.

1. **Designate a Telework Program Coordinator.** The development of a telework program is typically managed by Human Resources with input and guidance from Executive Leadership and Information Technology (IT).
2. **Conduct an assessment of jobs and employees.** Determine which jobs are most conducive to telework. Consider criteria such as job function, performance, communication, and work style when identifying employees who may be successful in a telework environment.
3. **Determine the costs and savings associated with telework.** Assess any costs associated with implementing a telework program, such as IT and equipment expenses. Identify the added savings as a result of implementing a telework program.
4. **Conduct an IT assessment.** Consult your IT department to ensure that technology is in place to support teleworkers through remote access, availability of equipment, and communications tools.
5. **Develop a Telework Policy and Teleworker Agreement.** A formal policy and an employee agreement will clarify the roles and responsibilities and establish the parameters for teleworking. Telework agreements should be revisited and renewed with employees at least annually.
6. **Deliver manager and employee training.** Provide training to managers on effectively managing remote workers. Provide training to teleworkers on company policies and expectations for teleworkers.
7. **Implement a pilot program.** Start small with a select group of employees and managers to assess impacts on communication, technology, teamwork, productivity, and morale.
8. **Evaluate the pilot program.** Conduct a focus group and survey of participating employees and managers to determine the impacts of the telework program.
9. **Make decisions about continuing the telework program.** If appropriate, use the results of the pilot to formalize and expand your telework program and conduct an evaluation annually to ensure ongoing success.

# PARTICIPANT SELECTION



# SAMPLE PARTICIPANT SELECTION APPLICATION

Name:	Title/position:
Department:	Supervisor:
Email:	Date submitted:
Proposed telework site address:	

Telework is a workplace strategy that can involve working from home or another location on a full- or part-time basis. Teleworking can be a productive scheduling practice for many employees although it may not be feasible for employees whose job duties and home environment may not be conducive to working away from the office.

Teleworking arrangements are successful when an employee's work responsibilities and personal work style are well matched with working away from the office.

This questionnaire provides an opportunity to consider whether teleworking is an effective tool for meeting your organizational and personal objectives. Responses to this questionnaire will help you and your supervisor to assess if teleworking can work for **[Company Name]** and you. This questionnaire must be completed by each person interested in participating in the telework program.

## Section 1: Administrative Qualifications

Administrative Questions	Employee Response	Manager Response
Has the employee in question completed _____ month/year probationary period?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
On the most recent employee evaluation form, has this employee identified as "Meeting Expectations" or better?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Do you understand that teleworking is a privilege, not a right; that not all employees may be eligible to telework due to tasks and/or workstyle; and that permission to telework may be revoked at any time by the supervisor?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Employee is not eligible to telework at this time if any answer above is "no."		

## Section 2: Employee Characteristics

Rate the employee's...	Employee Response			Manager Response		
	<input type="checkbox"/> Low	<input type="checkbox"/> Medium	<input type="checkbox"/> High	<input type="checkbox"/> Low	<input type="checkbox"/> Medium	<input type="checkbox"/> High
Level of self-motivation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of job knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to work well without constant supervision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discipline regarding work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount of weekly face-to-face contact required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to control schedule and work flow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount of in-office reference material required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Section 3: Tasks

Certain tasks, such as those requiring a high degree of focus, are more conducive to teleworking than others. What kinds of work would you expect to do while teleworking? (Select all that apply.)

<input type="checkbox"/> Accounting	<input type="checkbox"/> Drawing / designing / using CAD	<input type="checkbox"/> Researching
<input type="checkbox"/> Administrative tasks	<input type="checkbox"/> Phone or email correspondence	<input type="checkbox"/> Software management / development
<input type="checkbox"/> Clerical services	<input type="checkbox"/> Planning	<input type="checkbox"/> Writing
<input type="checkbox"/> Computer programming	<input type="checkbox"/> Preparing reports	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Data management	<input type="checkbox"/> Reading	<input type="checkbox"/> Other: _____

Of the projects you typically work on, which do you feel would be best suited to telework? List below.

## Section 4: Telework Office

Given the amount of telework you want to do and the kinds of work you would do while teleworking, what equipment / services would you need and what do you currently have?

	Need	Have	N/A
Computer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Printer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scanner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Desk, filing space, other furniture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Others: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Are there any distractions or obligations that will make working at home difficult?

Yes  No

Has the employee submitted the Safety Checklist for the proposed telework office?

Yes  No

## Section 5: Schedule

Given the nature of your job, how frequently do you want to telework?

<input type="checkbox"/> Once every two weeks	<input type="checkbox"/> Once a week	<input type="checkbox"/> Two days a week
<input type="checkbox"/> Three days a week	<input type="checkbox"/> Occasionally for special projects	<input type="checkbox"/> Other: _____

Which day(s) do you want to telework?

<input type="checkbox"/> Monday	<input type="checkbox"/> Tuesday	<input type="checkbox"/> Wednesday
<input type="checkbox"/> Thursday	<input type="checkbox"/> Friday	<input type="checkbox"/> Varies by week based on project and office needs
Other: _____		

Are you willing and able to share your workspace at {organization} with another staff member when you are absent/not using the space?

Yes  No  Need more information

# TECHNOLOGY SUGGESTIONS



# SAMPLE TELEWORK TECHNOLOGY & FACILITY CHECKLISTS

## Employee

Required:

- Computer (If not using dedicated work computer, ensure personal computer has requisite software and security)
- Workspace devoted to work needs, away from distractions
- Sufficient internet bandwidth (20-25 Mbps for most office work; more for roles requiring data transfer, streaming, other volume work)
- Virtual Private Network (VPN) access
- Telephone
- Teleconferencing software/cloud access

Recommended:

- Printer/Scanner/Fax
- Surge Protector
- External monitor, keyboard, mouse (as desired for comfort)

## Employer

Required:

- Virtual Private Network (VPN) service
- Teleconferencing service
- Sufficient device security<sup>1</sup>

Recommended:

- Network or Cloud-based document management service
- Voice Over IP (VoIP) telephone system
- IT Support (particularly during early phases)

1 See <https://csrc.nist.gov/publications/detail/sp/800-114/archive/2007-11-01>