The Managers & Supervisor's Quick & Easy Guide to Telework

* Greater Effectiveness
* Higher Quality Worker
* More Satisfied Employees
Telework is a management technique, proven to improve results and morale. A key to Telework success is an effective leader. This booklet is designed to provide an understanding of Telework from the manager's & supervisor's perspective. You'll find helpful information in the following areas:

1. Five Things to Know About Telework
2. What Telework Offers You, The Manager/Supervisor
3. Six Steps To Implementing Telework
4. Selecting Your Teleworkers
5. Possible Equipment Needs For Your Teleworkers
6. Training Your Teleworkers
7. Keeping In Touch
8. Managing Your Teleworkers
9. How Telework Makes a Difference
Telework, also known as telecommuting, is when employees work some place other than the traditional workplace. Below are some telework basics.

1. **TELEWORK IS NOT FOR EVERYONE.**
   An employee needs the right job content, offered work habits and work environment to be a successful teleworker.

2. **TELEWORK IS USUALLY DONE 1-3 TIMES A WEEK.**
   Telework can be done on a regular schedule or simply as needed.

3. **TELEWORK CAN BE DONE AT SEVERAL LOCATIONS.**
   Telework is usually done at home, but can also be available at telework centers or satellite offices.

4. **TELEWORK MAY BE DONE WITH A FORMAL AGREEMENT.**
   Research shows, however, that a formal agreement gives managers the structure and answers they want, making telework more comfortable for them and increasing both participation and the likelihood of continued success. A formal agreement includes a telework policy, selection criteria, training, equipment list, telecommunication form and home safety checklist.

5. **TELEWORK IS A MANAGEMENT OPTION.**
   It is a privilege, not a entitlement.
WHAT TELEWORK OFFERS YOU, THE MANAGER/SUPERVISOR

- Improves effectiveness and work quality.
- Provide an opportunity to be a more innovative, progressive, successful manager.
- Results in more satisfied employees and lower turnover.
- Increases ability to attract and keep valued employees.
- Reduces sick leave and reduces absenteeism.
- Provides the ability to work during unusual circumstances (i.e. blizzard, flood, earthquakes).
- Reduced office and parking space needs.
- Increase ability to meet air quality or transportation mandates.

WHAT DO SUCCESSFUL TELEWORK MANAGERS & SUPERVISORS HAVE IN COMMON?

- They trust their employees.
- They evaluate results, not activities.
- They are flexible and open to new approaches and solutions.
- They communicate openly and frequently with their employees.

Managers & Supervisors, as well as their employees, can enjoy the personal benefits of telework. With more quiet time and fewer interruptions, it's easier to think, plan and be more creative on telework days.
Once you decide to offer telework, following this six step action plan will help ensure success. These six steps constitute a "formal" program. A formal program is recommended because it provides the necessary structure and direction to make it easier for employees and managers to understand and participate in telework.

Some organization, especially smaller ones, may not want a formal programs. As long as people are flexible and communication is thorough, an informal approach to telework can work just fine.

**STEP 1**
GET A COPY OF OUR DEPARTMENTAL TELEWORK POLICY AND PROCEDURE BOOKLET AND DEPUTY DIRECTIVE DD-14R, EMPLOYEE TELEWORK. Caltrans has a telework policy Deputy Directive DD-14 for you to read, so you have a clear understanding of the telework parameters. It will cover things like eligibility, personnel and labor issues, risk management, equipment purchases, technical assistance, liability and security of data.

**STEP 2**
SELECT THE EMPLOYEES TO WHOM YOU WANT TO OFFER THE TELEWORK OPTION. Select employees who can work independently and with a minimum of supervision. Choose employees who can set priorities and get things done on time and with quality, staff you can trust to get the job done. These employees are going to be your successful teleworkers.

**STEP 3**
EQUIP YOUR TELEWORKERS. Most employees need some equipment to do their job, no matter where they work. Make sure your teleworkers have the equipment and services required to do their job.

**STEP 4**
TRAIN YOUR TELEWORKERS. Training has proven to increase the likelihood of success because it helps avoid pit falls and problems. Before your employees start teleworking, we recommend you develop a telework expectations sheet with each of them as part of their agreement.

**STEP 5**
KEEP LINES OF COMMUNICATION OPEN AMONG ALL EMPLOYEES. A key to a successful telework program is plenty of communication. It's easy to communicate with Teleworkers. You'll use a phone, fax, blackberry, and video conferencing or email instead of face-to-face contact on telework days. A kick off meeting with co-workers before telework starts is a must. At this meeting, or any time they arise, discuss questions and concerns openly and resolve them quickly. Most situations can be worked out if you address them before they become problems.
Evaluate teleworker and non-teleworker performance the same way by their results.

Determine up front how you will define success of your telework efforts. Whether in the office or out, management by results, not by appearance, is best.
Telework is a management option. It’s a privilege, not a entitlement. Not everyone wants to telework. Not everyone’s job is right for telework. Not everyone has the right work environment. The bottom line is you probably won’t want to offer it to every employee.

The first step is to hold a meeting with all your employees, to let them know about telework. Tell them what it is and isn’t, and how it all works. Ask for and answer questions and concerns. Finally, invite everyone who is interested to fill out a Telework Agreement.

Here are some suggestions that will increase the ease and accuracy of selecting successful teleworkers:

* If you are unsure how successful telework will be for you, start small with a few teleworkers. Evaluate their success. When you’re ready, select other interested employees and expand telework.

* Select teleworkers who can work independently with little supervision, who can set priorities and get things done on time and with quality, and whom you trust to do the job.

* If an employee requests to telework but you think he or she will not be a successful teleworker, it is best to wait until the problems are resolved. Explain the situation fully to the employee, including what is needed to correct the problem and the timetable for reevaluation.

* Consider offering other flexible work arrangements, such as flex time or compressed work weeks, to those who can’t telework.

### TYPICAL TELEWORK TASKS

- Analysis
- Auditing reports
- Batch work
- Calculating
- Computer programming
- Conducting business by phone
- Data entry
- Design work
- Dictating
- Drafting
- Editing
- Evaluations
- Field visit
- Graphics
- Maintaining databases
- Meeting with clients
- Preparing budgets
- Preparing/Monitoring contracts
- Project management
- Reading
- Record keeping
- Research
- Sending/Receiving email
- Spreadsheet analysis
- Thinking
- Typing
- Word processing
- Writing
WHAT MAKES A SUCCESSFUL TELEWORKER?

* Self motivated and responsible
* Well organized and self disciplined
* Results oriented
* Works independently
* Familiar with job requirements
* Knows organization's procedures and policies
* Currently successful in his or her job
* An effective communicator
* Adaptable
* Wants to telework
* Sensitive to impact on co-workers and clients

REQUIREMENTS FOR TELEWORK JOBS

Not all jobs are right for telework. A job is suitable for telework if the employee:

* has enough tasks appropriate for telework.
* can schedule face to face meetings on non-telework days.
* is able to meet client and co-worker needs when teleworking.
* can schedule use of resources that must stay at the office (e.g. security sensitive files, large equipment, shared resource material).
* is free to manage his or her own work flow.
* can benefit from quiet or uninterrupted time.
POSSIBLE EQUIPMENT NEEDS FOR YOUR TELEWORKER

WHAT EQUIPMENT AND SUPPORT MAY BE NEEDED?

Most employees need some equipment, no matter where they work. Equipment expands the types of work they can do away from the main office, which enables them to telework more effectively.

In most situations, there are some costs associated with setting up and conducting telework. It may require any or all of the equipment listed to the left.

OPTIONS FOR HANDLING EQUIPMENT NEEDS

Some teleworkers don't use computers in their jobs. Others use them at the office, but could arrange to do non-computer work on their telework days. Here are some ways to handle equipment needs:

* Teleworker plans telework days so he or she doesn't need additional equipment.

* Teleworker uses his or her own computer.

* Each Division may provide some things, such as a modem, broadband connection or a second phone line.

* Each Division may provide laptops for employees to check out on telework days.

* Each Division may provide purchase equipment for teleworkers.

THE TELEWORKER HOME ENVIRONMENT

It is important to both employers and employees that the home office be designed for safety, ergonomics and comfort. Managers should reserve the right to visit and evaluate the home office.

POSSIBLE EQUIPMENT NEEDS

Telework may require any or all of these items:

* Telephone
* Cell Phone
* Blackberry
* Pager
* Additional phone line(s)
* Computer
* Email
* Software
* Voice mail
* Printer
* Modem
* Fax machine
* Technical support
Training is vital to telework success. Proper training helps reduce the number of potential problems by giving teleworkers and their managers the opportunity to:

* learn about departmental policies
* ask questions and raise concerns
* develop workable solutions
* understand what makes telework successful
* develop telework assignment criteria

Both the teleworker and the manager and supervisor need telework training. Both can learn, ask questions and raise their concerns. The training gives both parties a thorough understanding of what telework is and how to make it work.

Training may be done by the teleworker/manager duo working together with the self administered Telework Training.

- The subjects to be covered in training include the following:

- Tasks to be done on telework days
- The telework schedule
- Planning for the telework day
- Equipment
- Tips for working at a home office
- Designing the workplace for safety, ergonomics and efficiency
- Communication tips and procedures
- Information security
- Management by results
- Troubleshooting and problem solving
- Maintaining your team
- The Telework Agreement

THE KICK OFF MEETING

Hold a staff meeting before telework begins. Ask your employees to share their expectations about telework and how it will operate. Invite employees to air their feelings and make suggestions so you can address concerns before they become problems.

You and your teleworkers should develop strategies to make sure co-workers are not inconvenienced, include subjects like message taking, notifying others of telework days and contacting teleworkers.
Telework is flexible. Because there are few hard and fast rules, you can structure telework to make it work for you. Some jobs allow full-time telework. Some employees and managers telework only as needed. Teleworkers typically are out of the office one or two days a week, which means that most teleworkers can be in the office most of the time.

One important thing to remember is that you shouldn't manage teleworkers any different than you do other employees. The main difference is that you use different communication methods when an employee is teleworking.

On telework days, you can easily reach your teleworker by phone, blackberry, fax, voice mail, or email instead of face to face. If you need teleworkers for an emergency face to face meeting, let them know about it, and they'll be there.

SCHEDULING OPTIONS

When you set teleworkers' schedules, the needs of the organization must come first, but there is usually plenty of room to accommodate the needs of the employee. Ideally, clients and co-workers can reach the teleworkers and the teleworkers can retain some flexibility in his or her work schedule. There are four basic scheduling options:

1. Teleworker works the same hours as in the office.

2. Teleworker is accessible by phone for a set number of "core hours" on telework days. For example, teleworkers may want to take a break when the kids come home from school and then return to work later in the evening.

3. Teleworker works an eight hour day, but not necessarily on the same schedule as the office. For instance, the teleworker may work 10 a.m. to 7 p.m. while the office hours are 8 a.m. to 5 p.m.

4. If it isn't necessary to coordinate teleworker and office schedules, the teleworker can work as he or she sees fit, as long as goals are met. For example, a writer or editor may work whenever and where ever he or she wants, as long as deadlines and fair labor standards are met.

Fact provide by the Department of Oregon and Washington.

"50% of the people who are applying for jobs or who we're recruiting are inquiring about compressed work weeks and telework, so it's an investment that is going to pay big dividends in the future for us."

As we move rapidly into the information age, the manager's role is changing. Today's managers and are supervisors challenged to:

* manage by results as opposed to observation
* act as a facilitator, rather than a superior or "boss"
* push responsibility to the lowest practical level
* support employee efforts to achieve a fulfilling balance of work and family life.

Telework makes it easier for the manager and supervisor to do all of these.

Allowing your employees to telework will take some of your time at first, but it's well worth it. Once you, your teleworkers and their co-workers get used to it, telework becomes part of the standard office routine, requiring no more management time or effort than any other work option. Here are some tips to make it easier to manage teleworkers:

* Manage your teleworkers the same way you manage your other employees. Teleworkers aren't doing different work, they're doing the same work in a different location.

* The best way to judge any employee's performance is by looking at results. Even when an employee is in the office and looking busy, you really don't know what they're accomplishing. No matter where or when the employee works, management by results is the way to go.

* Provide clear instructions and deadlines, interim checkpoints and regular feedback. Communicate clearly, maintaining your meeting schedule with teleworkers.

* Build in regular progress reports. This is especially important when the work product is not readily visible or easy to quantify. It will help you manage by results, a practice of most successful managers.

* There will be some changes in how things are done on telework days. The most common are: how you communicate, how you schedule meetings and how the teleworker's tasks are grouped. Most managers easily make these changes.

* Make sure co-workers know that teleworkers are still part of the team, no more or less important than anyone else.

* Track how the team feels about teleworking by talking with your employees. Bring up the subject of telework at staff meetings and invite open, honest communication.

Telework has been successful for thousands of organizations in the country and around the world, including these:

- The Aetna Casualty
- Department of Air Resources
- Apple Inc.
- American Express Co.
- A T & T Corp.
- Bank of America Corp.
- Blue Cross Blue Shield
- CAL/EPA
- Children's Hospital & Medical Center, Seattle
- Department of General Services
- Department of Personnel Administration
- General Electric Co.
- google
- Hewlett-Packard Co.
- Holland American Lines Westours, Inc.
- IBM, Inc.
- Intel Corporation
- Kaiser Permanente
- Kraft Foods, Inc.
- Levi Strauss & Co.
- Pacific Bell
- Proctor & Gamble
- Public Employees Retirement System
- Sun Microsystems
- United Airlines
- Federal and local governments
HOW TELEWORK MAKES A DIFFERENCE

* Accommodates employees
* Reduces sick leave and time off
* Enhances productivity
* Create fewer interruptions
* Increases job satisfaction
* Improves morale
* Reduces traffic congestion
* Leads to better customer service
* Improves health and decreases stress
* Allows for flexibility
* Improves air quality and reduces pollutions

For more questions on Telework, please contact Judy Shepherd in The Office of Business Services and Operations Security at 916-654-7040 or email at Judy_Shepherd@dot.ca.gov

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