A TELECOMMUTING GUIDE

FOR
MANAGERS AND EMPLOYEES

UNIVERSITY OF NORTH FLORIDA

INTRODUCTION

Telecommuting is a workplace option that allows work to be done at an alternate work site, such as the home, for one or more days a week. The purpose of this guide is to provide general information about telecommuting.

A generally accepted definition of telecommuting is: "The partial or total substitution of telecommunications and/or computer technology for the daily commute to work." Technology has increased the ability to communicate and share information with the office, thereby creating a virtual office where function and performance are more important than where the process occurs.

Potential Benefits of Telecommuting:

- ❖ Potential savings in utilities, office space, and parking
- ❖ Increase in performance and productivity
- ❖ Encourages flexible working hours, and potential savings in time and money
- ❖ Increase in job satisfaction
- ❖ Reduced absenteeism
- ❖ Lower employee turnover rate
- ❖ In an emergency when employees may not be able to get to the office, work can continue
- ❖ Employees have more control of their work environment

AMERICANS WITH DISABILITIES ACT (ADA)

Telecommuting may provide a method of accommodating employees or potential employees with special needs, such as those covered by ADA. Telecommuting does not reduce any need for the modification of the workplace required by the Act. It does widen the pool of potential employees available. One modification of telecommuting to meet ADA requirements may result in the covered employee working from the home each working day. Visits to the office would be infrequent. The option of telecommuting should be offered to qualified employees or potential employees as a work option to improve their quality of life, and promote greater performance.

IDENTIFICATION OF JOB CATEGORIES

Managers must identify job categories (not individuals) with work that can be performed at an alternate work site. Some considerations are:

- Job requirements that accommodate working away from the office for one or more days each week.
- Predictable contact with other employees and "customers."
- Identifiable portions of the job which can be done outside the office.
- Work that can be accomplished just as well inside or outside the office.

As a rule of thumb, if someone can close their office door for eight hours, without the need for face-to-face contact, then consider the job for telecommuting. If someone can "cluster" their work into eight hours not requiring face-to-face contact, they may be a candidate for telecommuting.

EMPLOYEE SELECTION

Telecommuting does not suit everyone. Careful selection and candid communication are essential elements in a successful program. Research shows that employees with the following characteristics generally make good telecommuters:

- Volunteer for the program
- Self-motivated
- Successful performance evaluations
- History of dependability
- Function independent of direct supervision
- Can deal with isolation
- Well organized with good time management skills
- Has an appropriate home work site that includes privacy and lack of distraction
- Has adequate level of job skills and knowledge
- Prefers the home environment
- Moderately people-oriented
- Proven good work habits
- Views telecommuting as an alternative to the traditional work environment

MANAGEMENT SUPPORT

- Telecommuting is a paradigm shift in thinking about the workplace and supervision, and for a telecommuting program to succeed it must have management support.
- The manager/supervisor must believe that telecommuting can work and be willing to develop realistic performance goals for the employee.
- The supervisor must support telecommuting and adapt management styles to continue providing effective guidance.

- Telecommuting is not a reduction of management/supervisory responsibility. Participation in a telecommuting program requires good communication and management skills.

TELECOMMUTING AGREEMENT

Prior to an employee becoming a telecommuter, a telecommuting agreement must be executed and approved. The agreement specifies the terms and conditions of telecommuting, which includes verification by the employee and supervisor that the home office provides work space that is free of safety and fire hazards. In the agreement, the employee holds the University harmless against any and all claims except workers' compensation claims, resulting from an employee working in the home office. The agreement also highlights the importance of effective communication between the employee and supervisor. Both must understand expectations in areas such as performance and work hours. The agreement documents the responsibilities of the employee and supervisor, establishes work hours, and contains a home office checklist.

The agreement must be signed and agreed to by the employee, the supervisor and the appropriate higher level supervisor. In addition to signing the agreement, there should be thorough discussion between the employee and supervisor about how future communication should occur. The discussion should include short and long term goals and how often the goals are reviewed, updated and evaluated. The agreement should reflect current performance objectives, and not create surprises when the time comes for employee performance evaluations.

Once the agreement has been completed, a copy must be submitted to the Director of Human Resources immediately after approval by all appropriate parties.

INFORMATION FOR THE TELECOMMUTER

To be a successful telecommuter, it is necessary to work with less structure and more freedom in completing responsibilities. Telecommuting is not as simple as staying at home and working. It requires careful planning and discipline.

Get organized. Good work habits from the moment telecommuting begins make it easy to complete work away from the office.

The Location. Identify a safe location in the home as work space. There is no need to devote an entire room for the office at home. Some telecommuters have successfully developed a part of an existing room, a basement room or an attic for their work station.

Locate the work station away from distractions. Working on the couch in front of the T.V. does not work! There is more information about the home office later in the guide.

Set a Routine. Set a work schedule for telecommuting days and stick to it. The agreement has an attachment for defining work hours. Begin and finish work at the same time on telecommuting days. This helps set a routine.

Replace the Ritual of Getting Ready for Work. Telecommuters will no longer have the traditional office rituals of morning conversations or coffee. Even the drive to work that symbolizes the beginning of the work day is missing. Set up new rituals for telecommuting days. Some telecommuters actually leave their house, go around the block, return, and begin the work day. Others play specific music or begin working after a morning exercise session or bike ride. Each worker should find a ritual which will work for them.

Make a Daily "Things-to-Do" List. Develop a list of goals and assignments for telecommuting days. At the end of the day, go over the list and see how much has been accomplished. It's helpful to start the list a couple of days before telecommuting. This helps to plan for all the resources needed to support activities at home. Remember there may not be access to a FAX, copier, or even a computer at home. Plan the work accordingly.

Have an End of the Day Ritual. It's a good practice to have a ritual in place to mark the end of the work day. Be creative in deciding what to do.

- ☐ Turn off the computer and the lights
- ☐ Close the door
- ☐ Turn on the TV
- ☐ Walk around the block
- ☐ Pick up the children from school or day care
- ☐ Change clothes

Managing the Work. As a telecommuter, it is necessary to manage work efficiently. It is up to the telecommuter to make sure they keep well-informed and continue with a high level of performance.

Maintain Contact with the Office. Be sure to stay in touch with the office during telecommuting days. Try establishing a buddy system with a trusted colleague or a secretary in the office who can be called once or more a day. Frequently call the office for messages and return phone calls. Do not fall out of touch when telecommuting. Decide early in the day how accessible to be.

Voice Mail. Voice mail is an invaluable telecommuting tool. If there is no access to voice mail in the office, consider using an answering machine while working at home. It will enable storing messages when unavailable. Decide if the office will tell callers to contact the telecommuters directly at home.

Set up a System at Home. Develop a system for organizing the work that will be done at home. Without the time to organize resources and materials there will be trails of paper and stacks of references everywhere!

Stick to Deadlines. While telecommuting, follow the same rules for deadlines as in the office. Don't miss deadlines. When mailing reports to the office, send them so they arrive the day they are due or earlier. When sending work electronically (by modem or FAX) it should also arrive on time.

Keep the Supervisor Informed. The telecommuter needs to keep supervisors informed about the status of the program, work progress, and any difficulty encountered. Supervisors are a client that needs information on a timely basis.

Attend Gatherings. Always attend office gatherings and group meetings. Don't become invisible because of telecommuting.

Train Family Members, Friends, and Neighbors. As a serious telecommuter, consider the work seriously. Be careful not to create a bad image for telecommuters. Train the people at home so there are not too many interruptions.

What Interruptions are OK? Determine what questions, favors, and needs may cause interruptions. Develop ground rules for the family to follow about interruptions while working remotely at home. Some telecommuters have their family determine the rules to ensure participation in the process. A family meeting is a prime opportunity to raise some of these issues. The rules should be understood by neighbors and friends. Remain flexible. Sometimes an errand may be the perfect break you need.

Office Supplies. Develop an understanding with family members about how office materials are used. Tell them what office supplies are for business only. The worker may want the work space to be off-limits to other members in the household.

Telecommuting is Not a Replacement for Child Care or Elder Care. Do not assume working at home means the ability to take care of children, it is ***not*** a replacement for child care. When taking care of children and being a telecommuter, there are two jobs instead of one! This may preclude handling the job in a professional manner.

The question often arises about telecommuting used during maternity leave. When attempting child care while telecommuting, one may need to request reduced work hours. Experience has shown that full-time telecommuting and full-time child care does not work. The same general guidelines apply when intense elder-care is needed.

THE HOME OFFICE

Most employees can create a temporary work area in their home that is adequate. However, for telecommuting to work there is a need to provide an "office" space with control over noise, interruptions, work equipment, and materials.

<u>Criteria</u>

Consider these basic criteria in organizing the home office:
- An environment that is free of safety and fire hazards
- An environment that promotes good work
- Adequate work space
- Access to telephone or electrical outlets
- Security and safety of work materials
- Separation from on-going domestic activities
- Temperature, sound and light control

Many professionals whose work is task-oriented can work at home for the duration of a specific project. Those workers may continue informal practices like taking a portable computer home and preparing the work on the dining table. For the purposes of this guide they are not telecommuters. The "occasional telecommuter" is someone who infrequently may find it beneficial to work informally with the supervisor.

A telecommuter works from a home office on a regular basis of one or more days each week. The telecommuter enters into a formal arrangement by qualifying for the program and signing an agreement.

<u>Liability/Cost</u>

1. The University shall not be liable for damages to the employee's property that result from participation in the telecommuting program.

2. The University shall not be responsible for the cost of utilities or home maintenance.

3. At the home office the employee is covered under the Workers' Compensation Law when performing official duties.

To allow the employee and supervisor to be comfortable with the home office, a checklist for the supervisor and employee to use in evaluation of the home work space is helpful and is included as a part of the Telecommuting Agreement.

Space Considerations:

A major requirement for the telecommuter is enough dedicated space in the home to support work-related activities. A spare room can be closed off from the rest of the house, or part of a room can be reserved for job-related work. The work setting should be large enough to accommodate files, computer equipment, shelves, and if needed, lockable cupboards. Those workers living alone can work almost anywhere equipped with the necessary electrical and telephone outlets. Those sharing a household must reach some accommodation with the rest of the family. **Face-to-face business contacts are done at the official office, not in the home.**

Employees with conflicting needs for residential space during telecommuting hours may not be accepted in the program.

Telephone and Electrical Outlets
Expenses to prepare a home for telecommuting may include installation of grounded outlets, a telephone jack, or an additional telephone line.

For those jobs requiring a computer, a grounded outlet is important in order to protect the employee. Newer residential construction will likely have three-prong outlets. Older homes may need these or other grounding methods added. These are expenses which the University does **not** pay for its employees.

1. There should be a surge protector between the electrical outlet and any computer to protect the equipment from faulty electrical fluctuations. No University owned computer equipment may be used in the home office without a surge protector, which may be provided by the employee's department.

2. A "work" telephone line will be necessary if the employee uses the phone to connect to another computer. This is even more important when the home phone is needed by other household members. Installation of a separate line may be required for jobs involving a high volume of telephone calls to or from the home office.

3. A business telephone should be installed in the telecommuter's home when necessary for successful telecommuting. The need for the phone should be determined by the supervisor in discussions with the telecommuter. This generally does not apply to occasional calls between the telecommuter and supervisor, but does apply when the telephone is an essential element of the work to be performed.

Examples of the criteria used to establish employer provided phone needs are:

- Use of the telecommuter's personal phone is not possible due to personal needs (other family members, etc.)
- It is necessary to make long distance calls on a regular basis, making it impractical to reimburse the employee (a University provided calling card may solve this problem on a limited basis)
- An on-line computer connection is necessary that requires constant access to the phone.

The Office of Information Technology Services can help with information concerning installation of a business telephone.

Security and Safety

In homes where a "spare" room can be converted for home work, a lock on the door or even a well-trained family may be adequate protection for files, materials left out on a desk, and equipment. If the work is performed in a shared space the employee must habitually store all work items in a protected place. This might be a closet, cupboard, or table located in such a way that property is not misplaced, lost, thrown away, or harmed.

All records, papers, and correspondence should be safeguarded for their return to the official work location. Computerized files should be similarly protected.

Sound Control

Protection of the telecommuter from household noise and the household from the telecommuter is important for a harmonious work environment.

The noise of a printer should be anticipated before setting up an office in the bedroom or anywhere that its noise will disturb other family members. Unlike the situation in many open office environments, telecommuters can often insulate themselves by closing doors.

Some noises are good. A completely noise free environment can be stressful. Background noise, like music, can be beneficial in maintaining productivity and reducing boredom.

Lighting

A computer user should be aware of the light levels in the work area. Too much light or light striking the screen at the wrong angle can glare, causing eye strain and fatigue. Non-glare filters over the monitor screen may diminish fatigue.

Supervisor Visits

When agreed to by the telecommuter the supervisor may inspect the telecommuting location to be sure proper maintenance of any employer-provided equipment is performed. At least 24 hours advanced notice of the inspection should be given to employees.   The visits shall be during normal (telecommuting) work hours. In no case should surprise visits be allowed. While not required, a supervisor's visit can help both parties remain comfortable with the telecommuting agreement when the visit is mutually agreed upon.

Equipping the Home Office

The office at home should be equipped with furniture and lighting appropriate to the tasks performed. High productivity cannot be expected from a worker stressed by aching arms and back, strained eyes and ears, or other discomforts. Special attention must be given to employees working in home offices at computer monitors. Poor positioning of the keyboard and screen relative to the worker's body can cause extreme fatigue.

To effectively perform their assigned tasks, University employees' are allowed to use University equipment at the home office. This is based upon the approval of their supervisor, and concurrence with University policy. The equipment must be protected against damage and unauthorized use. University-owned equipment is serviced and maintained by the University.

Employees may use their own equipment, however, maintenance of personal equipment is up to the employee and maintenance, repair and/or replacement is the sole responsibility of the employee.

INFORMATION FOR MANAGERS AND SUPERVISORS

Management Skills. The same management skills used to manage employees working in the office apply to the telecommuter.

Help telecommuters organize their work. Understand the time frame involved in completing tasks and the resources required to see projects through to completion. Use planning skills as a supervisor to be successful in distributing work among employees.

Work assignments. Set up a means of communicating the expected end product as well as the due date. Discuss the expected quality and other criteria which might affect the successful completion of tasks the employees will be working on.

Communicate to employees what needs to be done, when it needs to be done, and who needs to do it. The communication may take the form of a phone call, a weekly meeting, or memo. Use whatever means of communication is most comfortable. The time a manager spends communicating with the telecommuters will dictate the caliber of work produced. Spend time communicating clearly and concisely the expectations of supervisors.

Timetables. Work with your employees to develop attainable and timely goals. Telecommuters who clearly understand what the workload is will be more focused in their work if they are following a timetable. The timetable lists tasks for completion. It also notes the time which they should be finished.

Review work status. Set up intermediate periods to determine the progress of the tasks the telecommuter is performing. The assessment may be at designated points during the program, upon completion of certain tasks, or on a recurring basis, such as once a week on Monday.

Coach and develop employees' capabilities. There is limited time to spend with remote employees to reinforce behavior. Make the most of that time. Always reinforce positive behavior. Bring unsatisfactory performance to the employee's attention immediately. Develop employee capabilities to correct deficiencies. Use all the communications tools available to you to provide your employees with timely feedback. The feedback may be via voice mail, electronic mail, a phone call, or a face-to-face conversation.

Managers are generally familiar with these skills and use them while supervising employees in the office. Refining these management skills will not only benefit off-site workers, but supervisors and telecommuters as well. Organization leads to increased job satisfaction.

Management Methods

Management of employees from a remote location is not new. To ensure successful telecommuting, be aware of the following tips and traps:

- Close supervision is not always good supervision. Good supervision is achieved without being close in proximity.
- Be patient. Some managers initially resist managing employees at a remote location.
- Manage for performance and results instead of managing by observation. A common question is "how do I know when someone is working." Effective managers do not equate presence with performance.
- It is all right to drop out of the program. The telecommuting arrangement must be mutually supportive.

This program brings great flexibility to the work environment. Take advantage of that flexibility.

Some organizational hints:
1. Prepare an itemized list of what is expected from the employee. This list can be on a weekly, monthly, or quarterly basis. Use the flexibility of establishing objectives in a format which will be easy to administer.
2. Include the telecommuter in the process of establishing objectives. This enables the employee to make a valuable contribution concerning the accomplishment of the expectations.
3. Establish a matrix or a graph and clearly define what the telecommuter needs to accomplish for satisfactory and excellent performance evaluations. Be very explicit about what is expected from the employee.
4. Create a document to support your agreement. You can treat this document as a contract between you and the telecommuter, agreeing upon expectations. The agreement should be signed by both the employee and supervisor.
5. Track the results. If you set up weekly goals, schedule a meeting each week to review the telecommuter's accomplishments. Use this as a dynamic document, capable of changing when necessary. This will enable you and the telecommuter to determine success.

Employees feel they have more control over their destiny when they can track their success.

One method to measure individual productivity is the product produced. A better measure is performance in reaching the organization or team goal. A manager who focuses on the process will generally be rewarded by a better product. In measuring the performance of the telecommuter, consider the quality of work in reaching organizational goals rather than just counting beans.

ISSUES

The non-telecommuter in a Telecommuting Environment. Issues for consideration are:

1. Managing the Employees Who Aren't Telecommuting. After identifying the potential participants in a telecommuting program, work carefully with the non-telecommuters to avoid feelings of resentment. Resentment can form about "why was that person chosen instead of me?" Prepare in advance the necessary documentation needed to support the decision of why an employee was chosen to participate instead of another employee. There may be non-telecommuting employees who have been excluded from participating in the program due to job performance. Consider a plan to help these employees raise their job performance to a level that allows them to participate in the program. It's up to the supervisor to communicate this information to employees.

2. Team Effort. The non-telecommuters are as critical to the program's effectiveness as the telecommuters. The work group is successful due to the efforts of all members of the team.

3. Support Strategies. The non-telecommuters should not be expected to do extra work in the office while the telecommuters are working from their home office. Establish mutual strategies to support the non-telecommuters and the telecommuters.

4. Provide guidelines for contacting the telecommuter when an issue arises in the office which requires immediate action. Do not expect the non-telecommuters to work on their own assignments and also handle problems for the telecommuters who are working at home.

5. Establish guidelines for answering the telecommuters' phone while they are telecommuting. Include the secretaries and receptionists in the process of deciding what they will say in answering the phone. Refrain from advising incoming callers, *"Ms. Jones is at home today."* For example, use the phrase, *"Ms. Jones is unavailable. I'll be happy to have her return your call as soon as she is available."*

6. Establish guidelines for the telecommuters to call the office at regular intervals.

7. Determine whether it will be the telecommuter's responsibility to call the secretary for messages, or if it will be the secretary's responsibility to call the telecommuter.

8. Provide support staff with the home phone numbers of telecommuters. Forwarding the telecommuters' lines to voice mail is one method of handling calls. This ensures that calls are answered without adding extra work for the support staff. Consider forwarding calls to the home office phone.

9. Consider keeping a log of the incoming calls answered by the support staff for the telecommuter. This will assist in determining how much extra work has been generated as a result of the telecommuting program. The log will also provide documentation showing when the call came into the office, and when it was given to the telecommuter.

10. Social Network. It helps when non-telecommuters understand that the social interaction within the office will change with the start of telecommuting. Co-workers whom they share coffee breaks and lunch hours with may no longer be available to spend that time with them. The non-telecommuters may experience a quieter office after the program begins.

11. Contingency Plans. Set up a strategy to guide the work group through "what if" events that may affect the group as a result of telecommuting. Encourage the telecommuters and non-telecommuters to participate in this process.

12. What Happens if it's NOT Working? Not everyone who tries telecommuting is successful. Some reasons why the telecommuter may need to end their participation in the program may be:
    a. Uncontrollable distractions
    b. The neighbors and the family just don't understand that an employee at home is unavailable for other activities
    c. "Cabin fever"
    d. Being at home 24 hours a day becomes unacceptable
    e. The employee's productivity or the quality of the employee's work has declined since participating in the telecommuting program
    f. The employee discovers the need for social interaction is a critical factor in work life
    g. Work conditions, or the work to be done has changed.

Each supervisor should remain aware that there are many good reasons why employees may have to end their participation in telecommuting. Help employees understand their value to the University. Bring the employee back into the office as quickly as possible. Use this as a developmental opportunity to coach the employee in an area of weakness and create an area of strength from that weakness.

A Bright Future for Telecommuters

A key concern for telecommuters is that they will have less visibility in the office. This may impact upward mobility in the organization. Here are some points to help the supervisor in maintaining higher visibility for telecommuters:

- Monitor employee performance. Look for above average performance among the telecommuters.
- Encourage your employees to set higher goals. Assign more complex projects which will aid in developing your employee's skills.
- Communicate. Advise the upper management of the telecommuter's achievements.
- Ensure visibility. Take advantage of "opportunity assignments" and have the telecommuters participate in those assignments. When the opportunity arises for presentations, be sure to include the telecommuters.

Remember to think about telecommuters even if they are not in the office. Out of sight should not be out of mind!

SUPERVISOR'S SUMMARY

- Always keep in mind good communication skills are the backbone of a successful telecommuting program.
- Talk to the telecommuter.
- Use effective listening skills when exchanging information with off-site workers.
- Include the telecommuter in office activities even when they are not there. For example, include telecommuters on speaker phone when you sing happy birthday to someone in the office. This will make your telecommuters feel like they are a part of the day-to-day world of your department.
- Frequent communication with your telecommuters enables you, as the manager, to maintain the appropriate guidance and direction your employees need and expect.

- Keep the avenue open for reciprocal communications from telecommuters. This will help the telecommuters in avoiding feelings of isolation.
- Bring telecommuters back into the office frequently. As a manager, you can assign core days for telecommuters to be in the office. The core days are opportunities for staff meetings.

A telecommuting program is extremely flexible. Take advantage of that flexibility, and it can help achieve success in telecommuting and the benefits of increased performance, productivity and employee morale.