

MEMORANDUM

TO: Government Operations and Fiscal Policy Committee
FROM: Justina J. Ferber, Legislative Analyst
SUBJECT: Update – Employee Teleworking Program

The following persons will be present for the worksession:

Joseph Adler, Director, OHR
Steve Sluchansky, OHR, Manager, Labor and Employee Relations
Anita Brady, Manager, Training and Organizational Development

BACKGROUND

Telework is a work arrangement away from the principal office in which employees work at a time or place that allows them to accomplish their work in an effective and efficient manner. It brings work to the worker instead of bringing the worker to the work.

Issues that are driving telework implementation:

- advances in technology
- transition from Industrial Age to Information Age
- sociological trends (dual wage earner, single parent families, work and family life balance)
- changing worker values (emphasis on work/family balance and need to reduce stress)
- social and political pressures for environmental conservation
- organizational pressures to be more competitive, reduce operating costs and improve ability to recruit and retain workers
- continuity of operations and disaster recovery
- steeply rising gas prices

The report, *The Incredible Disappearing Office: Marking Telework Work*, pulled data from the 2010 U.S. Census and other sources and concluded that nationwide telework numbers across many industries are increasing. It found that the proportion of employees who work predominately from home has more than tripled in many industries over the last decade and doubled nationwide among all full-time (non-self-employed) U.S. workers.

The report notes that the private sector is embracing telework because it increases employee morale and productivity, provides work-life balance and reduces costs for enterprises that adopt it. Also it reduces office space needs and increases the amount of time employees spend working versus commuting and improves ability to recruit and retain workers. Some businesses see improved organizational cost efficiency in facility, health care, and other operating costs and see telework as an economic development strategy. While employers may not be able to increase compensation or provide other incentives, some have focused on telework as a benefit to entice employees to stay or hire on.

According to Tod Newcombe, Editor of *Public CIO* magazine, teleworking or telecommuting is a viable alternative for employees all over the board. He believes that a well executed telework program can help in building the next generation work force, aid government in a disaster, save energy and cut traffic congestion. It saves in employer/commuter costs – lower workspace and electricity costs for employers, lower direct commuting costs for employees -- but also in terms of environmental impact and in moving local governments closer to their mandated carbon footprint and recycling goals. Attached at ©1 is the Telework Coalition’s (TelCoa), America’s leading nonprofit telework education and advocacy organization, top ten reasons to Telework.

Attached and cited below are recent new articles related to telework.

News Articles

11-2-12	Stuck at Home? Tips for Working	<i>The Wall Street Journal</i> ©42
10-30-12	Could Sandy Give Teleworking A Boost?	<i>The Washington Post</i> ©43
10-21-12	Working from home grows in popularity across area	<i>The Washington Examiner</i> ©48
9-18-12	Teleworking trends gain momentum in private sector	<i>Unified Communications</i> ©49
9-10-12	Telework guru takes phoning it to new levels at patent office	<i>The Washington Post</i> ©50
8-12-12	Derecho blackouts demonstrate the need for more federal telework options	<i>The Washington Post</i> ©54
7-18-12	Telework points to management issues in and out of the office	<i>The Washington Post</i> ©56
7-13-12	Teleworking: A good but still-struggling idea	<i>The Washington Post</i> ©59
7-9-12	Telework is a work in progress	<i>The Washington Post</i> ©61

FEDERAL GOVERNMENT

Telework Enhancement Act

The signing of the Telework Enhancement Act in December 2010 (the Act) at ©2-20, set in motion a transformation of the Federal telework program. The Act applies to all Federal

agencies and provides a framework of requirements designed to ensure a more systematic implementation of telework than previously existed and adequate notice to employees of their telework eligibility status. Satisfying these requirements has meant a fundamental shift in how agency stakeholders view and implement telework -- from a strictly individual employee benefit to a strategic organizational change program.

The potential for agency benefits drives telework implementation. Aligned with agency strategy and mission, telework supports achievement of objectives increasingly important for operation of an efficient and effective Federal Government, including cost savings and improved performance, and maximizing organizational productivity. Developed as a strategic program, telework is a powerful agency recruitment and retention tool with the capacity to improve the competitive position of the Federal Government for recruiting and retaining the best possible workforce. Leveraged as a management tool, telework mitigates potential disruptions to workplace productivity (e.g., severe weather).

The Act specifies roles and responsibilities for the Office of Personnel Management, General Services Administration, Office of Management and Budget, Department of Homeland Security, National Archives and Records, Administration and others to provide overall guidance to Federal Executive agencies. It creates baseline expectations for agency programs and helps agencies implement those programs as effectively as possible. The Act provides overall policy guidance for Federal agencies, touching on various aspects of telework including security, emergency planning, official worksite and information technology. Individual Federal executive agencies are responsible for formulating their own telework policies, programs and procedures within this framework and reporting and monitoring the progress of telework in their agencies.

The Act specifically requires that each agency:

- Establish a policy under which eligible employees can telework.
- Determine the eligibility for all its employees to participate in telework.
- Notify all its employees of their eligibility to telework.
- Designate a Telework Managing Officer (The Act requires a certain status for the TMO as a senior official.)
- Provide interactive telework training to eligible employees and their managers and requires employees to complete the training prior to signing a telework agreement.

Telework Model and Telework.gov

The Telework Enhancement Act of 2010 is “a framework of identifying and training eligible employees, backed by appropriate policy and support, effective management oversight, and timely reporting... (that) offers a model not only for public agencies but also private organizations seeking to implement their own telework programs.” The Office of Personnel Management and the General Services Administration established an interagency website to provide easy access to information about telework in the Federal government – Telework.gov. Telework.gov is a resource that provides information and links to information under the following headings: Guidance and Legislation; Policies and Procedures; Reports and Studies; Tools and Resources; Telework Act of 2011; Frequently Asked Questions; Key Practices; Basics for Employees; Basics

for Managers; Training, etc. The website also has a Guide to Telework in the Federal Government and a Recipe Book which has information on performance measurement, skills development, technology customer service and subject matter expert tips.

Telework Oversight

The Federal Government has various oversight measures in place to ensure an efficient telework program. Departments initially determine which employees may be eligible based on certain criteria, including confidentiality requirements of the work product. Employees then perform a self-assessment to determine if they are good candidates for productive performance in a telework arrangement. The department and employee then enter into a formal telework agreement. Formal telework agreements include the following items to ensure compliant workspaces and data safety:

- Location of the telework office (home, telework center, other);
- Equipment inventory (what is supplied by the employee, agency, or telework center);
- In general, the job tasks that will be performed while teleworking;
- Telework schedule;
- Telework contact information;
- Safety checklist (certifying that the home office meets certain standards); and
- Expectations for emergency telework.

Barriers

The major barriers to telework implementation in Federal agencies are: management resistance, technology and security concerns. Some of the other lesser barriers are: nature of some jobs, budget constraints, office coverage, organizational culture, training, reluctant employees, revising policy, and mission requirements.

Summary

Well-established and implemented telework programs provide agencies a valuable tool to meet mission objectives while helping employees enhance work/life effectiveness. Specifically, telework: 1) is a useful strategy that **improves continuity of operations** to help ensure that essential Federal functions continue during emergency situations; 2) **promotes management effectiveness** when telework is used to target reductions in management costs, better leverage technology, and environmental impact and transit costs; and 3) **enhances work-life balance**, i.e. telework allows employees to better manage their work and family obligations, retaining a more resilient Federal workforce able to better meet agency goals.

D.C., HOWARD AND FAIRFAX COUNTIES, MARYLAND AND VIRGINIA

The Washington D.C., Fairfax and Howard County governments all have information about employee telework programs on their websites. Washington D.C. provides the employee

telecommuting application and policy on its website. Howard County provides the employee telework request form, telework agreement and assignment forms, telework office checklist and Alternative Work Schedule policy on its website. The State of Maryland website provides access to its employee policy on telework and to its Agency Teleworking Implementation Manual. Staff has materials from these jurisdictions available for review upon request.

Fairfax County provides a narrative on the benefits of and its support for telework on their website. It also includes the email address of their Telework Program Manager to respond to questions from county businesses and individuals. Currently, more than 1,000 Fairfax County employees telework on average of one day a month. Fairfax County is the first jurisdiction to reach and exceed the regional goal set by the Metropolitan Washington Council of Governments to have 20 percent of the eligible workforce teleworking one day per week or more by the end of 2005. Telwork!VA is the primary source for businesses, individuals and government agencies to start or expand a telework program in Northern Virginia.

MONTGOMERY COUNTY

The GO Committee was last updated on County government and agency employee teleworking programs in October 2008. Since that time the U.S. economy experienced a major recession, technology improved, gas prices soared, the job market shrank and the Telework Enhancement Act was signed into law. Due to the recession, County government and some businesses saw a decline in the number of telecommuters due to several factors: shrinking job numbers, shifting assignments, and nervous employees.

Committee Discussions

Various aspects of telework have been discussed by different Council committees: commuting and traffic congestion, tax credits for businesses, changes in demand for office space, environmental conservation, and disaster recovery/business continuity. For example, the PHED Committee has discussed the shrinking need for office space as the Federal government and businesses provide more opportunities for telework. Reduced office demand eases traffic congestion experienced on County roads. On the other hand, empty office space and reduced development present other issues for consideration by the Committee.

Tax Credit

In 2005 the Council approved a telecommuting tax credit to be allocated in 2006. Below is the current information on the tax credit. While the number of applications stopped during the recession, the Department of Finance received an application to be applied in FY12 and it is predicted that more applications will be forthcoming.

Montgomery County Home Computer Telecommuting Incentive Tax Credit:

<u>Levy Year</u>	<u>Amount \$</u>	<u>Recipients</u>
2012	Application pending	1
2011	0	0
2010	0	0
2009	0	0
2008	0	0
2007	\$1,337	2
2006	\$3,412	5

County Telework Plan

On September 14, 2004, the County Council adopted a resolution supporting the Interagency Telework Initiative and calling for an interagency operational telework plan and progress updates (©21-22). The resolution also acknowledged the Council's endorsement of the Metropolitan Washington Council of Government (COG) goal of having 20 percent of eligible employees participating in telework programs by 2005. An Interagency Telework Implementation Team was formed that developed the original operational plan attached at ©23-31. The Plan included common definitions, principles and targets to be used by each agency. It also specified those areas in which agencies would need to create their own distinct approaches and policies.

County Agencies

Attached in the packet are the most recent 2012 written updates on telework from Montgomery College ©32-33, Montgomery County Public Schools (MCPS) ©34-35 and Maryland-National Capital Park and Planning Commission (M-NCPPC) ©36. The College, MCPS and M-NCPPC have adopted employee telework policies and procedures that are readily available on their websites. The information includes telework agreements and other materials for employees of Montgomery College and M-NCPPC. Staff has these materials available for review upon request. County agencies do not have employees who use telework centers. M-NCPPC, County government and the College also use alternative work schedules as an option for employees.

The number of approved teleworkers has increased significantly at Park and Planning and slightly at MCPS. The College has a small decline; however, only half of their employees are eligible for telework. The County government has not submitted its numbers.

AGENCY	February 2006	October 2008	Change 2006 to 2008	November 2012	Change 2008 to 2012
MCG**	15	38	+23	**	**
MC*	61	84	+23	68	-16
M-NCPPC*	12	18	+6	113	+95
MCPS*	10	181	+171	196	+15
Total	98	321	+223	377	+154

*The College has a total of 2,166 employees; M-NCPPC has over 2,500 employees; MCPS has a total of 22,236 employees, and MCG has 8,850.

**The chart will be updated when data is received from MCG.

County Government

OHR continues to work with County departments to identify various alternative work schedule options available through collective bargaining and the personnel regulations – 10-hour day/4-day work weeks (“4/10”), compressed schedule, flextime, etc. At the MFP Committee meeting in 2008, Council staff suggested and Committee members agreed that data on informal teleworking arrangements should be provided and attempts should be made to capture a more accurate picture of what County employees are doing.

Today’s discussion will focus on the County government telework program and what is being done to adopt a telework policy and move forward with an official telework program. Telework has the potential to fundamentally change the way public service is delivered but requires an organizational culture shift.

Given current County fiscal constraints, teleworking can be an attractive benefit to employees. While the County is currently focusing on alternative work schedules such as the 4/10 workweek, the teleworking option is a more cost effective benefit and one in which the Council has expressed interest. Other County agencies have adopted policies and are implementing telework programs, but the County has not, and no official personnel regulations have been adopted. One item available on the County website is a “Helpful Tips” page on the Department of Transportation webpage. The County developed a 2006 Interim Telework Program Outline entitled “10 Steps to Telework” (©38-40) but it is not available on the County website or on the County intranet.

At packet deadline, OHR provided a timeline and materials for the County government Telework/Alternative Work Schedules Program. These materials are included at the end of this packet and may be duplicative of some of the materials provided by Council staff. A quick review of the materials shows that the County continues to use its interim telework policy and focuses on alternative work schedules

For FY13 the County did negotiate the following language in the MCGEO agreement:

Article 56 -Teleworking and Alternative Work Schedules

The parties agree to work together to identify and offer opportunities for teleworking and Alternative Work Schedules for bargaining unit employees. Teleworking and Alternative Work Schedule shall be referred to the County-Wide LMRC for the purpose of establishing a county-wide policy, no later than December 31, 2012, containing but not limited to the following: availability, job selection criteria, implementation procedures, employee accountability while teleworking and training of managers.

Discussion Questions

- What are the barriers keeping the County government from adopting a telework policy and program?

- When will the county-wide LMRC (Labor/Management Relations Committee) meet and conclude its work on telework and alternative work schedule issues? What can be done to accelerate the process?
- Since the LMRC will be discussing a county-wide policy, will “unrepresented employees” be a part of the committee deliberations?
- Will the LMRC be encouraged to review the work of others who have expertise in telework programs such as the Federal government model and other (local) government models?
- Should there be a telework advocacy program and a telework manager leading the program?

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The Telework Coalition's (TelCoa)

Top Ten Reasons to Telework.

For the Employer and the Economy:

- Create jobs, improve competitive advantage, and foster the ability to better compete in an increasingly globalized economy via homeshoring/homesourcing
- Reduce costs: real estate, facilities, direct labor, business travel, and other overhead expenses; notably liability and health insurance
- Improve recruiting and retention of skilled labor for enhanced productivity, creativity, and higher quality work product results
- Provide hope and economic opportunity (especially in rural areas) for service disabled veterans, others with disabilities, older workers who desire to remain in or reenter the workforce, and for part-time employment reducing reliance on benefit programs

For the Employee:

- Better balance family and work responsibilities, become self reliant, and participate more often in local activities
- Retain a larger percentage of earnings for a higher quality of life and less dependence on outdated over stressed institutions

For the Environment and Society

- Lower carbon footprints, greenhouse gas emissions, and improve air and water quality
- Reduce dependence on foreign energy, especially petroleum
- Lessen highway congestion, reduce the need for capital intensive transportation 'solutions' (highway, rail, bus, parking garages, security, etc.) and lower 'rush hour' transit related accidents and fatalities

Decrease the impact from or likelihood of natural disasters, pandemics and terrorist events

telework.gov

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This page can be found on the web at the following url:

http://www.telework.gov/Telework_Enhancement_Act/Highlights/index.aspx

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What Are the Highlights of the Act?

The Telework Enhancement Act of 2010 is a key factor in the Federal Government's ability to achieve greater flexibility in managing its workforce through the use of telework. Well-established and implemented telework programs provide agencies a valuable tool to meet mission objectives while helping employees enhance work/life effectiveness. The signing of this law was the culmination of years of legislative activity to advance Federal telework. Here are several highlights of the Act and its provisions, at a glance:

- Signed into law by President Barack Obama on December 9, 2010
- Applies to all Federal Executive agencies
- Provides a framework for Federal agencies to better leverage technology and maximize the use of telework
- Will help agencies recruit new Federal workers; help retain valuable talent; improve the ability of the Federal Government to maintain Continuity of Operations (COOP) to keep Government operational during National security incidents, natural disasters, or other emergencies; and enhance the ability of Federal employees to better manage their work and family obligations
- Requires each agency to establish a policy under which eligible employees can telework
- Directs agencies to designate a Telework Managing Officer (TMO)
- The TMO is responsible for policy development and implementation related to telework

- programs; serves as an advisor to agency leadership on telework matters; is a resource for managers and employees on telework; and is the primary agency point of contact with the Office of Personnel Management on telework matters
- Generally, requires agencies to provide interactive telework training to eligible employees and their managers and requires employees to complete the training prior to signing a telework agreement
 - Outlines responsibilities and expectations for policy guidance, reporting and monitoring of telework
 - Not later than 180 days from enactment (June 7, 2011), the Act requires agencies to:
 - Establish a policy authorizing eligible employees to telework
 - Determine eligibility for all of its employees to telework
 - Notify all agency employees of their eligibility to telework
 - Requires a written telework agreement between the employee and manager, regardless of whether telework is routine (i.e., regularly scheduled and recurring), or situational, episodic such as ad-hoc telework for special projects or unscheduled telework when Federal offices are closed due to inclement weather
 - Requires agencies to provide an interactive telework training program to eligible employees and their managers and requires employees to complete the training prior to signing a telework agreement (the head of the agency may make an exception for employees with existing agreements who have been teleworking)
 - Requires every Executive agency to incorporate telework into their Continuity of Operations (COOP) plans
 - Provides for agency consultation with various agencies for guidance and support including the Office of Personnel Management (OPM), General Services Administration (GSA), Office of Management and Budget (OMB), the Department of Homeland Security (DHS), including the Federal Emergency Management Agency (FEMA), National Archives and Records Administration (NARA), and the National Institute of Standards and Technology (NIST)
 - Requires every Executive agency to work in coordination/consultation with OPM to satisfy mandatory data collection and reporting requirements beginning with the first report to Congress not later than 18 months from enactment (June 2012) and on an annual basis thereafter
 - Requires OPM to maintain a central telework website that includes specific information/guidance as described in the Act, including coordinated links to information provided by GSA and FEMA
 - Requires OMB to issue guidelines by June 7, 2011 (180 days), to ensure the adequacy of information and security protections for information and information systems used while teleworking; also requires OMB to issue policy guidance by April 8, 2011 (120 days from enactment) on purchasing computer systems that enable and support telework

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EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET
WASHINGTON, D. C. 20503

THE DIRECTOR

July 15, 2011

M-11-27

MEMORANDUM FOR THE HEADS OF EXECUTIVE DEPARTMENTS AND AGENCIES

FROM: Jacob J. Lew
Director 

SUBJECT: Implementing the Telework Enhancement Act of 2010: Security Guidelines

President Obama signed into law the Telework Enhancement Act of 2010 (the Act; Public Law 111-292) on December 9, 2010, to improve telework across the Federal government. As part of its telework program, each agency must ensure that adequate information and security protections for information and information systems are used while teleworking. This memorandum provides guidelines on security requirements for the implementation of the Act, as required by 5 U.S.C. § 6504(c).

Telework provides multiple benefits for the Federal government, including resource savings, improved sustainability, employee recruitment and retention, as well as supporting the continuity of operations. With the passage of the Act, more Federal workers will soon begin to work from home or at shared government spaces to improve productivity, reduce the overhead costs and real estate footprint of the Federal government, and continue to deliver timely services to the public.

Telework leverages innovative technologies to allow Federal employees to work from any location to improve productivity, assure continuity of operations, and respond to the changing needs of the workforce. Some Federal agencies are testing effective telework models found in the private sector, such as “hoteling” stations. These stations provide laptop connections and can double or triple the number of workers in a work space; this maximizes space, reduces costs, and should be applied government-wide whenever possible.

The Administration has set up central resources across agencies that provide guidance and best practices for effective telework management, implementation, and monitoring.¹ The Office of Personnel Management (OPM) has recently issued a *Guide to Telework in the Federal Government*.² OPM, in collaboration with each agency, will compile and submit an annual report on the telework programs of each agency, beginning with the first report submitted 18 months after enactment of the law (June 2012), and annually thereafter.

¹ <http://www.telework.gov>

² http://www.telework.gov/guidance_and_legislation/telework_guide/telework_guide.pdf

Telework also provides Federal employees the ability to continue working during inclement weather, emergencies, or situations that may disrupt normal operations. However, telework is only as effective as the technologies used to support it, which is why it is critical for agencies to take immediate action to ensure that their employees are properly equipped.

If not properly implemented, telework may introduce new information security vulnerabilities into agency systems and networks. To prevent security incidents, agencies are responsible under the Federal Information Security Management Act of 2002 (FISMA) (Title III, Pub. L. No. 107-347; 44 U.S.C. § 3541-49) to provide protection for information and information systems commensurate with risk. Agencies must continue to follow Office of Management and Budget (OMB) policies, National Institute of Standards and Technology (NIST) standards and guidelines, and Department of Homeland Security (DHS) security reporting requirements. NIST has issued standards and guidelines to assist with the protection of remote devices; agencies should refer to NIST's security telework site for more information (<http://csrc.nist.gov/telework>).

Agencies are expected to implement security telework policies to best suit their unique needs. At a minimum, agency policies must comply with FISMA requirements and address the following:

- controlling access to agency information and information systems;
- protecting agency information (including personally identifiable information) and information systems;
- limiting the introduction of vulnerabilities;
- protecting information systems not under the control of the agency that are used for teleworking;
- safeguarding wireless and other telecommunications capabilities that are used for teleworking; and
- preventing inappropriate use of official time or resources that violates subpart G of the Standards of Ethical Conduct for Employees of the Executive Branch by viewing, downloading, or exchanging pornography, including child pornography.

Agency chief information officers (CIOs) must identify a technical point of contact to DHS (FISMA.FNS@dhs.gov) to aid with the implementation of telework security requirements. This point of contact will serve as a technical manager and must have operational and technical expertise to implement the Act within the agency.

Please direct questions on the security requirements referenced in this memo to the Cybersecurity Performance Management Office, Federal Network Security Branch, DHS at FISMA.FNS@dhs.gov or 703-235-5045. For NIST-policy related questions, please email telework@nist.gov.

telework.gov

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Guidance for Federal Agencies

This section offers specific Office of Personnel Management (OPM) guidance to Federal agency staff responsible to implement the Telework Enhancement Act of 2010. The guidance is presented in question/answer format, based on the most commonly received questions from the agencies on the Act.

- [General Questions on the Act](#)
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- [Telework Agreements](#)
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General Questions on the Act

What is the Telework Enhancement Act of 2010 (the Act) and why is it important?

The Telework Enhancement Act of 2010 (Act) is the common name for Public Law 111-292, signed by President Barack Obama on December 9, 2010. The passage and signing of the Act was a significant milestone in the history of Federal telework. It is a key factor in the Federal Government's ability to achieve greater flexibility in managing its workforce through the use of telework. The Act reflects the Federal Government's conviction that well-established and implemented telework programs provide agencies a valuable tool to meet mission objectives while helping employees enhance work/life effectiveness.

What does the Telework Enhancement Act of 2010 (the Act) require Federal agencies to do?

Among other provisions, the Act:

- requires each Federal agency to establish a policy under which eligible employees can telework
- mandates that each agency determine the eligibility for all of its employees to participate in telework
- requires that each agency notify all of its employees of their eligibility to telework
- directs agencies to designate a Telework Managing Officer (TMO)
- requires agencies to provide interactive telework training to eligible employees and their managers and requires employees to complete the training prior to signing a telework agreement
- outlines responsibilities and expectations for agencies with regard to policy, policy guidance and support; reporting and monitoring of the progress of telework in the various agencies

Does the Act mandate telework for Federal employees?

No, the Act does not mandate telework or promote telework for its own sake. Instead, it asks agencies to implement telework as a workplace flexibility that assists agencies to maintain continuity of operations and reduce management costs while also improving Federal employees' ability to balance their work and life commitments. The Act encourages an increase in the use of telework, but only for employees who choose to do so.

How long do agencies have to implement the provisions of the Telework Enhancement Act of 2010 (the Act)?

The Act requires Federal Executive agencies to immediately:

- designate a Telework Managing Officer (TMO)
- take steps to incorporate telework into their Continuity of Operations (COOP) plans

Within 180 days from enactment of the Act (i.e., by June 7, 2011), agencies are required to:

- establish a policy under which eligible agency employees may be authorized to telework
- determine employee eligibility to participate in telework
- notify all employees of their eligibility to telework.

What agency roles and responsibilities are outlined in the Act?

Every Federal Executive agency is responsible to:

- establish a policy under which eligible employees may be authorized to telework
- determine employee eligibility to participate in telework
- notify all employees of their eligibility to telework
- incorporate telework into Continuity of Operations (COOP) plans
- ensure that each eligible employee authorized to telework enters into a written telework agreement with his/her supervisor
- ensure that an interactive telework training program is provided to eligible employees and their managers and that employees successfully complete training prior to entering into a written telework agreement
- designate a Telework Managing Officer (TMO) to serve as the primary point of contact with OPM on telework matters on behalf of the agency
- while developing telework policies, consult with OPM as needed for policy guidance in various areas such as performance management, pay and leave, recruitment and retention, etc.

The Office of Personnel Management (OPM) is responsible to:

- provide consultation, policy and policy guidance to the agencies on telework in the areas of pay and leave; agency closure; performance management; official worksite; recruitment and retention; and accommodations for persons with disabilities.
- assist each agency in establishing appropriate qualitative and quantitative measures and teleworking goals
- consult with the Federal Emergency Management Agency (FEMA), the General Services Administration (GSA), and the National Archives and Records Administration (NARA) on telework policy in areas that include COOP, technology, equipment, dependent care, and records management

OPM is further responsible to maintain a central telework website (www.telework.gov), that includes telework links, announcements, and guidance developed by OPM or submitted by FEMA and GSA (OPM is required to post FEMA and GSA guidance no later than 10 business days from receipt).

OPM, in collaboration with each Federal executive agency, is required to compile and submit annual reports on the telework programs of each agency, beginning with the first report not later than 18 months after enactment of the Act (June 2012), and on a yearly basis thereafter. In addition, OPM is tasked with researching the utilization of telework by public and private sector entities that identify best practices and recommendations for the Federal government; and to review the outcomes associated with an increase in telework, including the effects of telework on energy consumption, job creation and availability, urban transportation patterns, and the ability to anticipate the dispersal of work during periods of emergency, and to make findings available to the public.

The Office of Management and Budget (OMB) is required to:

- consult with the Department of Homeland Security (DHS) and the National Institute of Standards and Technology (NIST), to issue guidelines to ensure the adequacy of information and security protections for information and information systems used while teleworking, by June 7, 2011 (180 days from enactment of the Act)
- issue policy guidance no later than 120 days from enactment (April 8, 2011), requiring each agency, when purchasing computer systems, to purchase systems that enable and support telework,

unless the agency head determines that there is a mission-specific reason not to do so.

The General Services Administration (GSA) will be available to consult with OPM on policy and policy guidance for telework in the areas of:

- telework centers
- travel
- technology
- equipment
- dependent care

The Federal Emergency Management Agency (FEMA) will be available to consult with OPM on policy and policy guidance for telework in the areas of:

- continuation of operations
- long-term emergencies

The National Archives and Records Administration (NARA) will be available to consult with OPM on policy and policy guidance for telework in the areas of:

- efficient and effective records management
- preservation of records, including Presidential and Vice-Presidential records



Telework Policies

The Telework Enhancement Act of 2010 (the Act) requires that each executive agency shall "establish a policy under which eligible employees of the agency may be authorized to telework." Our agency already had a telework policy in place before the law was passed. Are we required to develop a new policy?

Not necessarily. Section 359 of Public Law 106-346 (October 23, 2000), stated that "[e]ach executive agency shall establish a policy under which eligible employees of the agency may participate in telecommuting to the maximum extent possible without diminished employee performance." Therefore, the law has required executive agencies to have a telework policy in place long before the passage of Public Law 111-292 (the Act). However, the Act expands upon and strengthens the Federal Government's commitment to the telework program. As such, it is incumbent upon each executive agency to carefully review and revise the telework policy already in place to ensure it meets the requirements of the Act. For example, the prior legislation did not offer details on the elements necessary to establish a telework program at an agency (e.g., creating telework agreements) or how to go about implementing the day-to-day operational aspects of telework. The Act provided several clarifying criteria and agencies incorporated the changes into their existing policies. One key example is the law's requirement that the agency's telework policy include specific language to "require a written agreement that is entered into between an agency manager and an employee authorized to telework, that outlines the specific work arrangement that is agreed to; and is mandatory in order for any employee to participate in telework." Another example is the mandate that "[e]ach executive agency shall incorporate telework into the continuity of operations plan of that agency." With this in mind, each agency should take time to review their present telework policy to ensure it meets the requirements of the Act. To the extent that agencies

have a viable telework policy in place, this should be an exercise in revision rather than creation of a new telework policy. Agencies also should allow pre-decisional involvement to the fullest extent practicable as provided in Executive Order 13522 and satisfy collective bargaining obligations by working with labor when developing their telework policies and agreements.

Does the law require that our agency submit its telework policy to OPM for their review?

No, there is no requirement in the Act that an agency submit their telework policy to OPM for their review or to determine compliance with the law. What the Act does require is that each executive agency "consult with the Office of Personnel Management in developing telework policies." The law further explains that OPM shall "provide policy and policy guidance for telework in the areas of pay and leave, agency closure, performance management, official worksite, recruitment and retention, and accommodations for employees with disabilities." Additionally, OPM will "assist each agency in establishing appropriate qualitative and quantitative measures and teleworking goals." OPM provides consultation by means of telework guidance and information offered on the central website at www.telework.gov and at regularly-scheduled OPM-sponsored forums with Telework Managing Officers in the course of the year.

In 2009-2010, we submitted our agency's telework policy to OPM for review and evaluation. Is there a relationship between that policy review and the Act's requirement to establish a telework policy?

While the policy review initiative was not directly related to the Act, we consider the work accomplished to have laid a firm foundation for the development of sound telework policies as required by the Act. OPM provided feedback to agencies at the conclusion of the review to recommend revisions to their policies. The criteria by which policies were evaluated by OPM were derived from a thorough review of current research and best practices in telework, conducted by an interagency group of Federal telework experts. Some of the experts with whom we consulted were from agencies with premier telework programs that may have served as models for the legislation. Because of the close interaction between experts in the Federal telework community, it should come as no surprise that the criteria for the policy review correspond so closely with the key criteria emphasized in the law. The effect of this is that agencies that have been implementing the feedback OPM provided for the policy review are already well on their way to meeting the law's requirement to establish an effective telework policy.

Can an agency's telework policy stipulate that an eligible employee that occupies a telework-suitable position *be required to telework*?

There does not appear to be any language in the Act that would lead us to revise our understanding that telework is a **voluntary flexibility**. In other words, an agency may not compel an employee to telework, even if the duties of the position make that employee "telework eligible." However, although entering into a telework arrangement is voluntary, once the employee is under such an arrangement, he or she may be required to telework outside of his or her normal telework schedule in the case of a temporary emergency situation if that understanding has been clearly communicated by the agency to the teleworking employee in the written telework agreement. Also, it is important to remember that the intent of the Act is to promote the use of telework and agencies should make every effort to encourage employees and managers accordingly.



Eligibility (including limitations and exceptions)

If an employee's position is determined to be telework suitable and the employee is eligible to participate, can the employee be required to telework even though he/she has indicated a desire not to telework?

No. An employee's "eligibility" for telework does not automatically confer the right or the obligation for an employee to "participate" in telework. Agencies have discretion to make their own eligibility and participation determinations for employees subject to operational needs while considering the specific requirements of the Act. The fact that an employee may be deemed "eligible" does not mean that the employee can be compelled to "participate" because telework is a voluntary workplace flexibility. In other words, an agency may not compel an employee to telework, even if the duties of the position make that employee "telework eligible." Keep in mind that although entering into a telework arrangement is voluntary, once the employee is under such an arrangement, he or she may be required to telework outside of his or her normal telework schedule in the case of a temporary emergency situation if that understanding has been clearly communicated by the agency to the teleworking employee in the written telework agreement.

Is OPM going to publish a Government-wide standard for eligibility for telework? Similarly, does OPM have plans to provide agencies standard letters or language to use in notifying their employees of their eligibility or non-eligibility for telework?

While OPM will continue to provide helpful tips to agencies, we have no plans to provide standard letters or a suggested Government-wide standard. Due to the variety of circumstances in each individual agency with regard to position classification, organizational structures and agency mission areas, it would be impractical and inadvisable for OPM to develop generic language that would imply a "one-size-fits-all" approach to making eligibility determinations and in notifying employees of eligibility.

Agencies have discretion to make their own eligibility determinations for employees subject to operational needs while considering the specific requirements described in the Act. In making these decisions, individual agencies are in the best position to define what it means to "ensure that telework does not diminish employee performance or agency operations."

Bear in mind that the Act makes a clear distinction between "**eligibility**" and "**participation**." To be able to participate in telework, an employee must first be identified as eligible. The Act specifies two categories of employees who may not be deemed eligible under any circumstances: an employee who *has been officially disciplined for being absent without permission for more than 5 days in any calendar year; and an employee has been officially disciplined for violations of subpart G of the Standards of Ethical Conduct of Employees of the Executive Branch for reviewing, downloading, or exchanging pornography, including child pornography, on a Federal Government computer or while performing official Federal Government duties* (Telework Enhancement Act, 6502(a)(2)(A)(B)) Thus, the Act does not establish new eligibility standards; rather, it specifies two conditions that make an employee ineligible. As before the signing of the Telework Act, specific determinations for eligibility are left to the discretion of agencies and should reflect agreement with standards established in individual agency policies.

Keep in mind that agencies cannot require employees to telework, but instead should rely upon voluntary participation. Further, while each manager should remember that the intent of the Act is to promote and encourage telework, employees should understand that participation is not a "right;" rather, it should be based upon sound business and performance management principles. Participation may be limited because of the duties encompassed by the position. Some are simply not conducive to telework, for

example, positions involving sensitive materials and those requiring daily face-to-face contact. Remember, according to the Act, participation shall *ensure that telework does not diminish employee performance or agency operations* (subsection 6502(b)(1)).

Does the Telework Enhancement Act of 2010 (the Act) apply only to domestic Federal employees or does it apply to individuals stationed overseas as well?

The Act applies to all Federal Executive agency employees, regardless of geographic location. Our interpretation is that the geographic location of the employee's permanent duty station does not determine the applicability of the Act. Subject to the limitations specifically described in the Act, the law applies to all employees in Executive agencies - we do not see any distinction made that would disqualify overseas employees from consideration. In the definitions section of the Act (Sec. 6501), the law refers to 5 USC 2105 for the meaning of the term "employee." You may look up this citation at the following link: <http://www.gpoaccess.gov/uscode>. If your agency is considered to be an Executive agency and if all of your employees fall within the definition in 5 USC 2105, the law applies, regardless of the location of any given employee's permanent duty station.

On a related note, there are some cases in which overseas employees may be prohibited from telework based on security reasons related to the position in question (e.g., some Department of Defense employees stationed overseas). However, note that in those cases, the determining factor for eligibility is NOT geographic location; rather, limitations due to the security-related nature of the position, which is consistent with the limitations described in the Act.

In Section 6502(a)(2), the Act describes two key limitations regarding which employees may not telework. Specifically, it says that an employee may not telework if A) the employee has been officially disciplined for being absent without permission for more than 5 days in any calendar year; or B) the employee has been officially disciplined for violations of subpart G of the Standards of Ethical Conduct for Employees of the Executive Branch for viewing, downloading, or exchanging pornography, including child pornography, on a Federal Government computer or while performing official Federal Government duties.

What does the term "officially disciplined" mean? If an employee has been officially disciplined as described, does this permanently bar that employee from telework or is there a specific time limitation after which the employee may now be considered for telework?

Generally, agencies have written policies that govern disciplinary and adverse actions. These actions can range from oral admonishments, to written letters of reprimand, and to suspension, termination or removal actions. These policies also often put time limits on maintaining documentation of specific actions. The term "official discipline" should be understood as a disciplinary action that results in the placement of a document in an employee's official personnel file (OPF). In OPM's view, the bar on participation would remain in effect as long as the document stays in the employee's OPF. For example, an admonishment or reprimand usually comes out of the file after one or two years, respectively. However, a suspension and termination never come out of the file. Based on this reasoning and in this context, suspension and termination actions, related to the two categories of employees described in the law, which result in a document that permanently remains in the OPF would translate to a permanent prohibition on telework participation. Please note that the law excludes telework only in the two narrow instances cited in the Act.



Telework Agreements

What should an agency consider when developing telework agreements?

The Telework Enhancement Act of 2010 (the Act) requires all telework participants to have a written agreement, for every type of telework *entered into between an agency manager and an employee authorized to telework, that outlines the specific work arrangement that is agreed to; and mandatory in order for any employee to participate in telework.* Many agency policies and collective bargaining agreements currently describe specific requirements for the agreement, or make agreement templates available to employees and managers. For agencies seeking to develop or revise agreement forms, it might be helpful for you to consider this bulleted outline when drafting specific content. The following are recommended tips based on best practices to guide planning; *they are not specifically required in the Act:*

- Term of the agreement: consider a one-year renewable agreement, or even a six-month agreement in telework situations that may need to be revised more frequently;
- Type of telework specified by the agreement: describe if the agreement is for regular, recurring telework or ad hoc/situational/episodic telework;
- Schedule: specify days of the week and the hours to be worked during telework days;
- Requirements: outline any additional requirements (e.g., technology) beyond the prerequisites to telework outlined in the Act (e.g., training, written agreement);
- Expectations: clarify any assumptions, for example, regarding work location (e.g., if expected to work only from home) and frequency and modes of communication (e.g., email vs. telephone, core hours for contact, speed for returning calls);
- Equipment and other expenses: determine and specify equipment and/or expenses that will be covered by the agency, employee, or shared;
- Information security: provide a summary for data security procedures in the agreement;
- Safety: provide a self-certification safety checklist to telework employees as a guide when preparing the alternative work location for telework;
- Termination/modification: ensure that employees know the agreement can be terminated or modified, and outline the conditions for termination/modification.

Agencies also should allow pre-decisional involvement to the fullest extent practicable as provided in Executive Order 13522 and satisfy collective bargaining obligations by working with labor when developing their telework policies and agreements.

Is it necessary for an employee who only teleworks on a case-by-case basis to have a written telework agreement?

Yes, the Telework Enhancement Act of 2010 requires every employee who participates in telework to have a written agreement, regardless of the type of telework.

Continuity of Operations

What is my agency's responsibility under the Telework Enhancement Act of 2010 (the Act) with regard to emergency preparedness and Continuity of Operations (COOP)?

Telework must be a part of all agency emergency planning. In fact, Section 6504(d)(1) of the Act requires each executive agency to "incorporate telework into the continuity of operations plan of that agency." The Federal Emergency Management Agency's Federal Continuity Directive 1 defines COOP planning as "an effort within individual agencies to ensure they can continue to perform their Mission Essential Functions (MEFs) and Primary Mission Essential Functions (PMEFs) during a wide range of emergencies, including localized acts of nature, accidents, and technological or attack-related emergencies. There is a direct relationship between the COOP plan and telework. Telework can help ensure that essential Federal functions continue during emergency situations. As such, management must be committed to implementing work arrangements as broadly as possible to take full advantage of the potential for telework for this purpose.



Training

Has OPM made any decisions regarding training provided on the telework.gov website? Does the training presently available on www.telework.gov meet the definition of an "interactive telework training program" described in the Act?

The basic "Telework 101" training modules for managers and employees presently on www.telework.gov are adequate for the moment to meet the requirement of the Act to provide an interactive telework training program. OPM is working with a vendor to revisit these telework.gov training modules to update and enhance the information, format and learning experience for managers and teleworking employees alike. We will keep the agencies informed of new developments.

Is there additional training out there for managers to help them make a successful transition to telework both for themselves and their teleworking employees?

Yes, specialized training for managers is available through OPM's Eastern and Western Management Development Centers. Details on the Development Centers and course scheduled can be found at www.leadership.opm.gov.

The Act requires the successful completion of "an interactive telework training program" for employees prior to entering into a written telework agreement. By "interactive," does this mean that training must be "instructor-led" or face-to-face rather than via computer?

In fact, no definition appears in the law for the term "interactive," thereby leaving it subject to interpretation. OPM has always considered the "Telework 101" training on www.telework.gov (and therefore, online) to meet the definition of "interactive" in that there is a built-in opportunity for the trainee to self-assess his/her understanding through the use of frequent questions and answers and progress checks throughout. For this reason, we maintain that the training currently on telework.gov meets the requirement of the law. In 2011, OPM engaged a vendor to enhance this training in a number of ways, including both substance and format. This is being accomplished keeping in mind improved "interactivity" through the selective use of media tools that will make the training more engaging for employees. However, OPM's interpretation is that there is no requirement that this training be instructor-led as compared to computer, i.e., Internet-based.

Many of our employees have been teleworking for some time now. Are they still required to take the telework training?

Not necessarily. The Act states that the head of the agency may provide for an exemption from the training requirements "if the head of the agency determines that the training would be unnecessary because the employee is already teleworking under a work arrangement in effect before the date of enactment." The bottom line is that employees who have already been teleworking may be exempted from this training requirement; however, the decision to waive this training requirement must be made by the agency head and implemented in the manner in which that is normally done in your agency.

Even if employees are specifically exempted, OPM recommends that agencies provide to employees at least updated information related to the Act since their original training would not have covered its requirements.



Pay and Leave

Where can I find guidance on pay and leave issues related to telework?

Agencies are encouraged to consult the OPM website section titled Information on Federal Pay and Leave, at www.opm.gov/oca, for guidance on pay and leave issues related to telework.



Agency Closure

Where can I go for answers to my questions about the use of telework during dismissal or closure situations, i.e., when Government offices are closed to the public due to weather or other emergencies?

In addition to incorporating telework into their Continuity of Operations (COOP) plans, agencies should have clear telework policies with regard to other situations that may disrupt normal operations such as early dismissals or closure of offices to the public as a result of inclement weather. Policies and telework agreements should provide clear instructions and describe expectations for employees and management during such times. For example, agency telework policies and individual telework agreements should spell out whether or not employees are expected to work from an alternative work location on days that they are regularly scheduled to telework and the Federal Government has announced unscheduled leave/unscheduled telework, delayed arrival, early departure, or that offices are closed to the public. Agencies are encouraged to consult the OPM publication, Washington, DC, Area Dismissal and Closure Procedures, for answers to questions about dismissal or closure situations.



Performance Management

Where can I find guidance on performance management issues related to telework?

Agencies are encouraged to consult the OPM website section on Performance Management, at www.opm.gov/perform, for guidance on performance management issues related to telework.

How do I know what my employees are doing when I can't see them?

Performance standards for employees working from alternative work sites are the same as performance standards for those working at the traditional work site. Management expectations of a teleworker's performance should be clearly addressed in the employee's performance plan, and performance plans should be reviewed to ensure the standards do not create inequities or inconsistencies between non-teleworking and teleworking employees. Of course, teleworkers can and must be held accountable for the results they produce, as are non-teleworkers. The bottom line is that good performance management techniques practiced by a manager will mean a smooth, easy transition to a telework environment.



Official Worksite

Where can I find guidance on official worksite issues related to telework?

Agencies are encouraged to consult the [Official Worksite, Travel, and Related Policies](#) section of www.telework.gov, for guidance on official worksite issues related to telework. On the main page, select the tab [Policies and Procedures](#) and you will find the link on the left-hand navigation menu.

Recruitment and Retention

How are agency efforts in recruitment and retention impacted by the implementation of the Telework Enhancement Act (the Act) of 2010?

The implementation of the Act provides a unique opportunity to leverage telework as a human capital management tool. Managers are encouraged to use telework as a tool to help attract, recruit, and retain the best possible workforce. Many people seek jobs with an option to telework as a means to reduce commuting time and costs and improve their work/life effectiveness. Telework can broaden the pool of highly qualified candidates because it provides flexibilities that meet varying needs. For example, an agency's telework policy may enhance the agency's ability to grant reasonable accommodations that work well for the agency and persons with disabilities who may request them. While not all persons with disabilities need, or want, to work from an alternative location, such as from home, telework provides a viable option for individuals with disabilities that affect mobility or pose related challenges. Additionally, telework allows employers to hire individuals who live further away from what would be considered a reasonable commuting distance from their place of employment and who are not able to relocate. It also helps employers retain top-performing employees who want or need to relocate their residence beyond the local commuting area.

Telework can also help managers in other ways. For example, it can be used as an effective succession planning tool. Telework is an appealing option for many retirees who are willing to continue working with their former organization, thereby helping to facilitate a smooth and continuous transition of institutional knowledge and technical competencies.



Accommodations for Employees with Disabilities

How should telework be viewed in relation to a "reasonable accommodation" for employees with disabilities?

The flexible arrangements we describe as "telework" are governed by the telework laws, i.e., Public Law 106-346, Â§ 359 (2000); Public Law 108-199, Division B, Â§ 627 (2004); Public Law 108-447, Division B, Â§ 622 (2004); and, most recently, Public Law 111-292 (the Telework Enhancement Act of 2010). Although an agency with a robust, well-functioning telework policy may find that such a policy also enhances the agency's ability to grant reasonable accommodations that work well for the agency and the persons with disabilities who request them alike, it is important that requests to telework be analyzed and evaluated under their appropriate scheme, i.e., the telework laws and that requests for reasonable accommodations be analyzed and evaluated under the statutory framework that applies to them.

When considering telework for employees with disabilities, what factors should I keep in mind?

Reasonable accommodations are governed by Section 501 of the Rehabilitation Act of 1973 (Rehabilitation Act), *as amended*, 29 U.S.C. Â§ 791 *et seq.*, which was made applicable to Federal employees pursuant to the Americans with Disabilities Act. The Rehabilitation Act requires Federal employers to provide requested "reasonable accommodations" to employees with disabilities, unless to do so would cause an "undue hardship." The determination as to whether an employee may be granted the accommodation requested should be made through a flexible "interactive process" between the employer and the employee. Executive Order 13164, *Requiring Federal Agencies to Establish Procedures to Facilitate the Provision of Reasonable Accommodation*, requires all Federal agencies to develop a Reasonable Accommodation Policy. Therefore, agencies should refer to their Reasonable Accommodation Policy when considering reasonable accommodation requests. For example, depending upon the facts of a particular accommodation request, an agency that might have determined that a particular position should be ineligible for telework, might be required nevertheless to permit an employee with a disability within the meaning of the Rehabilitation Act to work from home to some degree. For more information on reasonable accommodation and the interactive process, see The U.S. Equal Employment Opportunity Commission's (EEOC) Revised Enforcement Guidance: Reasonable Accommodation and Undue Hardship Under the Americans With Disabilities Act, at <http://www.eeoc.gov/policy/docs/accommodation.html>. The EEOC has also provided guidance that focuses more specifically on the use of work from home as a reasonable accommodation in some circumstances. See *the Equal Employment Opportunity Commission (EEOC) Guidance on Work At Home/Telework as a Reasonable Accommodation*, at www.eeoc.gov/facts/telework.html, for more information.

It is important to distinguish between ordinary requests to telework and requests from persons with disabilities for reasonable accommodations and to know which is being requested in any given situation before attempting to analyze the request. If there is any ambiguity about what is being requested, managers and supervisors should clarify that ambiguity at the outset. It is often very fruitful for agency managers and supervisors to consult with the agency's reasonable accommodation manager and/or the agency's counsel as part of the interactive process established by the Rehabilitation Act, in order to fully understand managers' and supervisors' responsibilities under the law.



Telework Managing Officer

Do you have more information on the roles and responsibilities of the Telework Managing Officer (TMO)?

The Telework Enhancement Act of 2010 (Act) requires that each executive agency designate a Telework Managing Officer (TMO). Before the law was passed, most agencies fulfilled the day-to-day operational aspects of telework through a telework coordinator (with telework coordinators at the subagency level). The telework coordinator served as the key contact for policy and program questions. Many coordinators, however, had telework as a collateral responsibility without much authority or contact with senior leaders. The Act requires the TMO to assume these duties as the main agency official on telework matters. The TMO is a senior official of the agency, established within the office of the Chief Human Capital Officer (CHCO), or its equivalent, and who has direct access to the head of the agency. Note that s/he does not need to be the CHCO. The important thing is that the position be given direct access to the head of the agency. We believe it is the intent of this legislation that the TMO be a strategic thinker and planner who will help the agency to incorporate telework in a way that makes good business sense.

The TMO is responsible for policy development and implementation related to telework programs; serves as an advisor to agency leadership; and is the primary point of contact with OPM on telework matters. In addition to making telework an integral way of doing business in the agency, the TMO will be responsible for helping with the development of goals and metrics in order to evaluate the effectiveness of the program. In designating a TMO, agencies should look for the same leadership competencies and high standards that they would consider in selecting for any leadership position.

Please explain the difference between the Telework Managing Officer (TMO) and the Telework Coordinator that has overseen the telework program in my agency up until now.

The TMO designation is new with the passage of the Telework Enhancement Act of 2010. The TMO is a single person at each agency who is ultimately accountable for that agency's telework program. This position is meant to be a **high-level advisor** to the agency leadership, a resource on telework issues for managers and employees, and is responsible for policy development and implementation related to the agency's telework program.

The way agencies implemented telework before the law was passed was that each agency had a "Telework Coordinator" at the Department/Agency level (e.g., Department of Homeland Security), and also individual "telework coordinators" at the subagency/subcomponent level (e.g., Immigration and Customs Enforcement, Transportation Security Administration, etc.). Whenever OPM would require agency-wide information on telework such as for the annual aggregate data collected on telework participation, it would work with the single point of contact at the Department/Agency-level. The Agency-wide coordinator would then work with his/her subcomponent "coordinators" to gather the information for their respective areas and then would tally everything to submit the data in a single report to OPM on behalf of the entire agency.

The TMO position more closely resembles what was formerly the Department-level "Telework Coordinator." This means that the role within an agency of pulling together information on telework from various internal sources and then reporting to OPM now falls on the TMO. However, the TMO is much more than that since his/her duties extend beyond operational day-to-day aspects of telework and delve more into policy, advising, and an overarching management of the entire telework program for his/her agency.

Agencies have discretion as to whether or not, or how, they will continue to utilize "telework coordinators" to implement the day-to-day aspects of telework subject to the oversight of the TMO. The bottom line, however, is that each agency will have only one individual, i.e., the TMO, who is the single accountable person according to the law for the agency's telework program. In other words, when OPM contacts any given agency in the future to either request or disseminate information on Federal telework, the person with whom we will interact will be the sole point of contact, i.e., the TMO. It will then be up to the TMO to coordinate internally with other staff members assisting with operational telework issues in that agency. Human Resource staff or agency employees that have questions or issues about telework should be encouraged to direct their concerns to the agency's TMO.

Is it the role of the TMO to intervene when employees in an entire office are denied telework?

According to the law, among other responsibilities, the TMO "shall be devoted to policy development and implementation related to agency telework programs" and is to "serve as an advisor for agency leadership, including the Chief Human Capital Officer" and is to be "a resource for managers and employees." Since the intent of the Act is to encourage the maximum use of telework by Federal employees, given the duties described in the law, it would be appropriate for the TMO to advise agency management and leadership about the feasibility of denying telework participation to employees in an office. Of course, situations will vary and the TMO will need to take into account all of the facts that went into such a decision as well as potential opportunities for a synergistic approach to telework given the circumstances.



Reporting

Given the new telework legislation, can you tell us the status of the annual Call for Telework Data? Will there be a data collection for calendar year 2010?

At this time, we cannot provide agencies with a definitive timetable or format for the next call for telework data. OPM is working with an interagency group of telework experts to carefully analyze the section of the Telework Enhancement Act of 2010 (Act) that describes the data required for purposes of reporting. Some requested data under the Act will be the same as what we have asked for in prior years; however, other data will be different. We will provide agencies an update once we have a better sense of what the Act requires. What is clear is that the first Governmentwide report must be issued to Congress by OPM no later than 18 months from the signing of the Act. Given this timeframe, it appears likely that we would begin to collect data in late summer or early fall 2011; however, it is difficult to say exactly when just yet. Of course, we will share updated information with all agency Telework Managing Officers as this begins to take shape.



Facilities and Equipment

I have heard that GSA will no longer be supporting telework centers. Is this true? If so, does that mean that all telework centers will be closing?

Yes, it is true. GSA decided to withdraw from the telework center initiative as of March 2011. This withdrawal means withdrawal of funding and support for the centers. Note, however, that it does not necessarily mean the closing of all of the centers. Some centers have decided to independently continue to provide telework center workstations. As of this writing, the four centers listed below remain open as **privately operated facilities** after March 31, 2011:

- Fairfax, VA - contact Emeka Ezidinma at 703-279-3301
- Manassas, VA - contact Patricia Peacock at 703-993-9371
- Stafford, VA - contact Leigh Anderson at 540-288-3000
- Woodbridge, VA - contact Keith Lesser at 540-710-5002
- Also, you may want to review the information at this link <http://gsateleworkcenters.org/main.php>.

OPM will continue to coordinate information with GSA about travel, technology, equipment and dependent care, and will share that information along with any updates about telework centers via www.telework.gov.

1. [About Telework.Gov](#)
2. [Important Links](#)
3. [Site Map](#)
4. [Contact Us](#)
5. [Help](#)

[U.S. Office of Personnel Management](#)
[U.S.General Services Administration](#)

Resolution No.: 15-743
Introduced: September 14, 2004
Adopted: September 14, 2004

**COUNTY COUNCIL
FOR MONTGOMERY COUNTY, MARYLAND**

By: Management and Fiscal Policy Committee

SUBJECT: Interagency Telework Initiative

Background

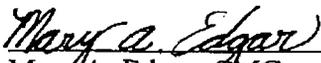
1. In April 2003, the Council adopted Resolution 15-112, officially endorsing the Metropolitan Washington Council of Government's (COG) goal of 20% of eligible employee participation in telework programs by 2005 for Montgomery County. The resolution indicated that the County Council would work with the business community to broaden business participation in telework efforts and requested that each County agency develop a plan to achieve the COG telework goal.
2. The Management and Fiscal Policy Committee has received regular status reports on telework efforts in County Government, Montgomery County Public Schools (MCPS), Maryland-National Capital Park and Planning Commission (M-NCPPC), Montgomery College, Washington Suburban Sanitary Commission (WSSC), and the Housing Opportunities Commission (HOC).
3. At the most recent status report on June 21, 2004, all agencies reported that they are working on telework initiatives. Agencies without existing programs are developing telework policies and identifying eligible positions for telework, and some have piloted or are planning to pilot telework programs. Agencies with existing programs are updating them and considering ways to expand them. The County Government's Office of Human Resources reported that agency Human Resources directors view telework as a priority and have expressed interest in an Interagency Telework Initiative.
4. The Management and Fiscal Policy Committee supports an Interagency Telework Initiative. Recognizing that each agency may have some unique needs, the Committee recommends that the Initiative include, to the extent possible, uniform telework policies.
5. The Committee supports general telework goals of increasing productivity, decreasing traffic congestion, and making it easier for employees to balance work and family. The Committee recommends that the Initiative include uniform data collection and reporting requirements to track progress in meeting these general goals, and to provide basic information about telework participation in each agency.

Action

The County Council for Montgomery County, Maryland approves the following resolution:

1. The Council requests that the Human Resources directors of County Government, MCPS, M-NCPPC, Montgomery College, WSSC, and HOC develop an interagency operational plan for telework implementation and maintenance.
2. The plan should cover the topic areas in the attached draft proposal; include a timeframe for implementation steps; review the status of each agency's telework efforts to date; to the extent possible, include uniform telework policies; and specify uniform data collection and reporting requirements to track progress in meeting general telework goals and to provide basic information about telework participation in each agency.
3. Using the attached draft as a guide, the Human Resources directors should complete an outline for the plan by December 1, 2004, including target dates to circulate a first draft, review and comment on the draft, and complete a final plan.
4. For calendar year 2005, each agency should provide semi-annual reports on its telework efforts to the Council, including data about telework participants, the impact of telework on commuting, productivity, and work/life balance, and the status of agency participation in the Interagency Telework Initiative. After 2005, each agency should provide an annual report including the same categories of information.

This is a correct copy of Council action.



Mary A. Edgar, *CMC*
Clerk of the Council

GOVT



Plan

MD
CC
SBF
LL

OFFICE OF HUMAN RESOURCES

Douglas M. Duncan
County Executive

Joseph Adler
Director

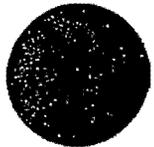
MEMORANDUM

November 30, 2004

TO: Marilyn Praisner, Chair, Management and Fiscal Policy Committee
Howard Denis, Lead Councilmember for Personnel Issues

FROM: Joseph Adler, Director
Office of Human Resources

SUBJECT: Interagency Telework Initiative



012332

On behalf of the Interagency HR Directors, enclosed is an Interagency Operational Telework Plan that includes uniform telework policies, data collection, and reporting requirements to track progress. Under separate cover, each Agency will submit information about their telework initiative and participation.

To ensure successful administration of the Interagency Telework Program, we have established a cross-functional implementation team that will meet on a regular basis to assess progress and share ideas. We also share your interest in encouraging County agencies to implement or expand participation in telework programs but may find the Metropolitan Washington Council of Government's goal of 20 percent of eligible employee participation a challenge to meet by 2005 based on agency priorities and staffing levels.

In addition to the Interagency Operational Telework Plan, enclosed is Montgomery County's implementation and phase in plan for Telework. If you have any questions or would like additional information, please let me know.

JA/kp
Attachment 2

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MONTGOMERY COUNTY
COUNCIL



INTERAGENCY TELEWORK PROGRAM FOR COUNTY AGENCIES OF MONTGOMERY COUNTY, MARYLAND

Overview

The Interagency Telework Program for County Agencies is an initiative by County Human Resources directors to establish an operational plan for telework implementation and maintenance. Agencies participating in the Program include the Montgomery County Government, Montgomery County Public Schools (MCPS), the Maryland National Capital Park and Planning Commission (M-NCPPC), Montgomery College, the Washington Suburban Sanitary Commission (WSSC), and the Housing Opportunities Commission (HOC).

Under the auspices of the Interagency Telework Program, County Agencies shall engage in a collaborative effort to meet the goals of the County Council for Montgomery County, Maryland to allow 20% of eligible agency employee's to participate in a telework program by the year 2005, as established by the Metropolitan Washington Council of Government's (COG). *A significant number of positions will not be eligible to participate in a sponsored Telework program due to the nature of the job (i.e. teachers, bus operators, public safety, maintenance, services & trade, highway service personnel and employees who provide direct service to customers).*

Organizational Structure for Implementation and Ongoing Administration

To ensure successful administration of the Interagency Telework Program, agency representatives shall establish a cross-functional implementation team that will meet on a regular basis to assess the progress of each agency telework program.

Background

An Interagency Telework team has met a total of six times since October 22, 2004 to identify uniform telework policies, data collection and reporting requirements to track progress and develop an interagency operational plan for telework.

Program Guidelines

The following Interagency Operational Telework Plan will serve as a guideline for County Agencies to administer and measure the success of their telework programs. Working within the confines of the Interagency Operational Telework Plan, County Agencies shall have the authority to administer their telework programs, policies, and procedures in accordance with their unique organizational needs. Accordingly, employees who participate in an Interagency Telework Program will be subject to the policies and procedures of their Agency's individual telework program.

Interagency Operational Telework Plan

Template

Definition:	<p>Telework: Under the Interagency Operational Telework Plan, County Agencies define Telework as working at home or at another work site instead of traveling to an agency office. Telework is a work alternative available to eligible employees when it would benefit both the agency and the employee.</p> <p>Alternate workplace: A work site other than the employee's traditional office setting; which could include the employee's residence, telework center, or satellite office.</p> <p>Eligible Employees: Employees eligible to telework must be in a job identified by the employee's supervisor and senior management as being suitable for telework. Eligible employees must also have demonstrated evidence of satisfactory work performance.</p> <p>Teleworker: Under the Interagency Plan, a teleworker is a person who, for at least two days or more per month, works at home or at an approved offsite location to produce an agreed upon work product.</p>
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Program Goals and Objectives	<p>Teleworking is a Community friendly program, which provides an alternate work arrangement for employees while supporting the mission of the Agency.</p> <p>Telework supports national and regional environmental efforts to improve air quality through a decrease in the number of vehicle cold starts and a corresponding reduction in traffic and mileage by teleworkers who would otherwise commute.</p> <p>By providing flexible work arrangements such as telework, County Agency's afford employees opportunities to enrich their lives by gaining quality time otherwise lost as a result of lengthy commutes.</p> <p>In addition to enabling employees to balance work and family obligations and by assisting in the community effort to reduce outdoor air pollution attributable to automobile travel, telework may ultimately help to retain excellent employees, provide a way to conserve scarce office space, and lend support during emergency contingency plans.</p>
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**Program
Policies /
Guidelines**

Employees who participate in an Interagency Telework Program are subject to all County Agency policies and procedures including, but not limited to those regarding confidentiality; disclosure of information; conflict of interest; and acceptable use of information technology resources.

Telework is not a formal, universal employee benefit but an alternative method of meeting the needs of a County Agency. Since *telework is a privilege*, agencies have the right to refuse to make telework available to an employee and to terminate a telework arrangement with adequate notice to the employee.

Employees may be restricted or limited if participating in other alternate work schedules.

Employees participating in an Interagency Program will "telework" two or more days per month, up to the maximum allowed per Agency, and report to the office for work the other days.

Each County Agency will *identify and determine which positions are eligible* to participate in Telework based on job requirements and the needs of the department within each County Agency. While an employee's position may be eligible for Telework, a determination of whether the employee meets the employee eligibility criteria, the work space requirements, and the skills required for successful teleworking must also be evaluated.

Employees in eligible positions who wish to participate in the Telework Program will be required to complete a Telework Application. The application will be reviewed and approved by the employee's immediate supervisor and senior management as defined by each County Agency.

Salary, benefits, and job responsibilities do not change as a result of teleworking. Employees will work their approved work schedule.

Telework employees agree to perform only official duties and not to conduct personal business while on work status in the home office. Personal business includes, but is not limited to, caring for dependents or making home repairs, etc.

Each Agency will have its own Telework application, agreement, and procedures that meet the business needs of that particular agency for the purpose of employees Teleworking.

<p>Position Eligibility</p>	<p>Telework is a cooperative arrangement between the County Agency and the employee. The arrangement is <i>voluntary</i> and its approval is based on a review of the departmental work program, the employee's job duties and performance level, as well as the proposed alternate work site.</p> <p>The County Agency identifies eligible positions based on the:</p> <ul style="list-style-type: none"> ▪ essential functions of the position and its ability to perform off-site with only e-mail and phone support; ▪ work performance for the position can be measured in a telework arrangement; ▪ proprietary information of the County Agency can remain confidential; and ▪ ability to maintain or improve service delivery to internal and external customers. <p>Participation in telework opportunities will vary among departments, offices, and units, depending upon the needs of the particular area and the function and responsibilities of the position.</p>
<p>Employee Eligibility</p>	<p>Employees must have demonstrated evidence of satisfactory work performance.</p> <p>Employees must have proven competencies in critical areas to perform successfully in a telework environment, including the ability to work independently and plan and carry out assignments with little assistance or direction from others. It is the responsibility of the supervisor to assess whether the employee has developed these skills within the scope of his/her position. Candidates must have:</p> <ul style="list-style-type: none"> • Strong time management skills • Strong communication skills • Ability to prioritize • Proficiency with technology

<p>Safety of Off-Site Work Space</p>	<p>Employees participating in the telework program must designate a specific work space for use for telework. The designated work space must be maintained by the employee in a clean, professional, and safe condition.</p> <p>The employee's off-site work space will be considered an extension of the Agency's work space. The Agency reserves the right to inspect the work space upon 24 hours notice. Workers' Compensation liability is limited to the designated work space as opposed to all areas of the home.</p> <p>In the event of an injury at the off-site location, the employee shall immediately (as circumstances permit) contact his/her supervisor.</p>
<p>Equipment</p>	<p>Employees participating in the telework program may be responsible for the cost, purchase and maintenance of office equipment and supplies necessary to properly furnish the work space used for telework to include utilities, telephone, internet connections, and related costs at the off-site location.</p> <p>The purchase of equipment solely for the purpose of permitting an employee to function in a teleworking environment will be determined by each County Agency depending upon resources and business needs.</p> <p>Consumable office supplies typically used by the employee in the course of business at a County Agency will be provided with the prior, written approval of their immediate supervisor.</p>
<p>Program Support (IT: Training and Performance Evaluation)</p>	<p>Each Agency will identify technology required to support telework and address identified needs of eligible employees of that particular agency.</p> <p>Each Agency will identify training required to support telework and address identified needs of eligible employees and their supervisors. If applicable, Agencies will partner to pool resources.</p> <p>Teleworkers will be held to the same performance evaluation standards as other employees within each Agency.</p>

**Telework
Schedule,
Hours and
Availability**

A regular telework schedule must be established and approved by the immediate supervisor prior to beginning a telework schedule. The amount of time the employee is expected to work per day or per pay period will not change due to participation in the telework program.

A telework schedule may include one, two or more days per month (up to the maximum days allowed by each agency) of work at home or at an alternate work site. Longer telework schedules may be approved for a limited period on an exception basis. Employees shall not perform personal business or activities during designated work hours.

Employees who have a telework schedule may cease teleworking by notifying their supervisor in advance of terminating the work arrangement. Supervisors may terminate the telework arrangement with adequate notice to the employee.

Employees who telework must be available by telephone and/or e-mail during scheduled work hours.

Participants in the telework program are required to have a telephone. Employees may be required to check voice mail and e-mail messages on a regular basis.

The supervisor retains the right to require an employee who teleworks to commute to the office on a regularly scheduled telework day should the work situation warrant such an action. This situation is expected to be only an occasional occurrence. If the employee is frequently required to return to the office during a regularly scheduled telework day, the supervisor may re-evaluate the compatibility of the employee's position and job responsibilities with teleworking.

Employees participating in the telework program will continue to follow the Agency's times and attendance standards and adhere to their approved work schedule, including work hours, while teleworking.

If a telework employee is unable to work when scheduled to work off-site, the employee will notify the supervisor and report hours worked and use of applicable leave for hours not worked.

Telework employees must obtain advanced supervisory approval before performing work in excess of their regular work schedule. Any overtime work must be pre-approved by the appropriate supervisor.

Employees who telework are required to submit bi-weekly time sheets in accordance with the normal schedule.

**Program
Evaluation and
Outcome
Measures**

To ensure consistency in evaluating Agency telework programs and reporting on the impact telework has on commuting, productivity, and work/life balance, County Agency's shall collect the following information annually from each teleworker, using a uniform questionnaire:

- Name, title, department, etc.
- Worksite location(s) on non-telework days
- Number of miles between employee's home and the worksite (one way)
- Means of transportation on non-telework days (drive alone, carpool/vanpool, transit - bus or rail, bike/walk)
- Usual commute routes on non-telework days (as applicable to the top ten commuter routes in the Washington D.C. Metropolitan area)
- Type of telework site (home, telework center, satellite office, other)
- Address of telework site
- Number of days employee is scheduled to telework per month
- Number of miles from employee's home to the telework site (one way)

Based on the information collected above, each County Agency shall report the following information to the Management and Fiscal Policy Committee on an ongoing basis:

- Number of employees in positions eligible to telework
- Number of active teleworkers
- The average number of days employees are scheduled to telework per month
- Total number of days employees teleworked overall
- Average number of miles traveled between teleworker's homes and worksites (one way) on non-telework days
- Means of transportation on non-telework days
- Top ten commuter routes typically traveled by teleworkers on non-telework days (as applicable to the Washington D.C. Metropolitan area)

The Interagency Telework Team will develop and administer a standardized survey to be completed by teleworkers and supervisors of teleworkers every other year to collect and report on the following information:

- Performance and productivity impacts
- Planning and scheduling impacts
- Communication and work team impacts
- Impact on balancing work/life issues
- Impact on job satisfaction
- Changes in telework status and reasons prompting those changes

Montgomery County Telework Implementation and Phase in

December 2004	For the purposes of this program, the scope of employees includes full-time and part-time unrepresented in the executive and legislative branch of County government.
January - February 2005	<p>Create an interdepartmental Telework team to:</p> <ul style="list-style-type: none"> ▪ review policies, procedures and communication ▪ assist and guide managers in the identification of positions ▪ define IT support ▪ refine Informational Packets for Teleworkers and supervisors
March 2005	Promote and enlist departmental support for teleworking.
March - April 2005	Partner with interested departments in the identification of suitable positions.
March - April 2005	Department Directors or designee will identify and determine which positions are eligible to participate based on job requirements and the needs of the organization.
May - June 2005	Develop an "Orientation to Teleworking" for employees and supervisors.
July 2005	Teleworker enter an agreement

MONTGOMERY COLLEGE
Office of the Vice President for Human Resources, Development, and Engagement

Montgomery County Council GO Committee
November 19, 2012

Update on the Montgomery College Telework Program for Administrative, Associate and Support Staff
&
Alternate Work Schedule

Telework

Montgomery College employees continue to participate in the telework program that was established for its positive impact on the environment and work/life balance. Eligible employees include full-time and part-time staff who have successfully completed the initial probationary period and administrators. Participation in the telework program varies among departments, offices, and units, depending upon the needs of the particular area and the function and responsibilities of employees. Decisions to allow employees to telework at Montgomery College are made by the administrative unit head and the appropriate vice president, senior vice president, or chief of staff. In determining whether to endorse a request for telework, leadership considers the impact of service delivery to internal and external customers among other considerations.

Prior to beginning a telework agreement, employees must establish a schedule that includes specific days and hours that he or she plans to work at the alternate work location. Notably, Montgomery College employees have not utilized a designated Telework Center as a means to telework.

As of November 8, 2012, there were sixty-eight (68) employees participating in the College's telework program. Additionally, over the past six months, three (3) telework participants separated from the College. As compared to previous years, these numbers reflect a dip in participation; however, the decline is thought to be the result of introducing a formalized Alternate Work Schedule (AWS) option for administrators and associate and support staff, in which many employees have opted to participate in lieu of teleworking.

Alternate Work Schedule

In addition to providing a positive impact on the environment and work/life balance, the College's AWS as introduced in June 2012, is intended to support operational requirements by enhancing recruitment and retaining excellent employees. The decision to allow an employee to participate in an AWS at Montgomery College is also made by the administrative unit head, appropriate vice president, senior vice president, or chief of staff.

An AWS is granted for up to 12 months. Prior to gaining approval, employees must choose a work schedule that is appropriate to their occupational class. For instance, associate and support staff may request from the following alternative work schedules:

- a. four ten-hour days (alternative work schedule A)
- b. four nine-hour days and one four-hour day (alternative work schedule B)

Additionally, exempt staff may request eight nine-hour days and one eight-hour day for a two-week pay period (alternative work schedule C). Administrators are eligible to request alternative work schedules during the months of July and August.

As of November 8, 2012, there were sixty-one (61) employees participating in an AWS. Over the past six months, one (1) participant separated from the College. Additionally, during the months of July and August, eight (8) administrators engaged in an AWS.

Finally, since introducing the AWS and updating our telework application process, the Office of Human Resources, Development, and Engagement is not aware of any informal alternate work schedules or telework agreements actively in place. Furthermore, whenever there is a change in supervision, the unit is responsible for reviewing and determining whether to continue all alternate work schedules.

According to the latest figures, there is a total of 1,239 administrators, associate, support, and temporary with benefits staff actively employed at Montgomery College. The total number of employees, which includes those not eligible to telework (full-time and part-time faculty, continuing education faculty, casual temporaries, and student employees), is 2,166.

MCPS Telework Report FY 2013

- 1) An update on the number of formal Telework agreements (with employees) you have, including the total number of employees in your agency.

One hundred ninety-six (196) Montgomery County Public Schools (MCPS) employees have formal Telework agreements. The total number of MCPS employees is 22,236.

- 2) The number of employees using Alternate Work Schedules including a breakdown between compressed, flexible, and Telework schedules.

MCPS does not implement compressed schedules. MCPS administrators have the option of a flexible schedule for no more than four weeks during a fiscal year. The number of employees utilizing the flexible schedule in 2012 was 104. This number will vary each school year.

- 3) Advise if there is a trend, e.g. increased or decreased use of Telework and if there are informal Telework arrangements.

Since 2008, the number of teleworkers has increased gradually. There was a slight decrease in 2010–2011, but overall, the growth has been steady. MCPS does not have informal telework arrangements.

Year	Teleworkers
2008–2009	177
2009–2010	186
2010–2011	146
2011–2012	190

- 4) Please advise if there are equipment, technology, security, collective bargaining, or other issues affecting Telework that you wish to share.

Virtual Private Networking (VPN) enables those teleworkers with MCPS-issued laptops to access resources on the MCPS network, including applications and documents, as if they were at work. Users of the VPN server are expected to abide by all regulations of the MCPS private network and are restricted to the same access as when connected to the network directly. Access to other systems or devices without authorization is prohibited. Also, access to the network using VPN software is meant for the assigned user.

For those approved for VPN access, but without access to MCPS-issued computers, the terminal services gateway (TSG) is available. The TSG adds the capability of virtually accessing the employee's work station in the office through the employee's home computer.

- 5) Also it seems that the use of Telework Centers has decreased so please indicate if any of your Teleworkers continue to use a designated Telework Center.

MCPS does not utilize a Telework Center.

MCPS Telework Report FY 2013

- 6) Provide any other facts about Telework or Alternate Work Schedule that you feel Councilmembers should know.

During telework training, participants are provided with the VPN access approval form and submission directions as well as information about how to ensure that all electronic files remain secure whether using an MCPS-issued computer or a home computer when teleworking. See also #4.

Positions with the most participants (10 or more participants):

Job	Participants
0833 Instructional Specialist	34
0931 Pupil Personnel Worker	29
0933 Psychologist	36
1008 Consulting Teacher	29
5160 IT Systems Specialist	10

Maryland-National Capital Park and Planning Commission (MNCPPC)*

- 1) An update on the number of formal Telework agreements (with employees) you have, including the total number of employees in your agency.

One hundred thirteen (113) MNCPPC employees have formal Telework agreements. The total number of MNCPPC employees is around 2500. The bulk of employees are park general maintenance workers who cannot telecommute.

- 2) The number of employees using Alternate Work Schedules including a breakdown between compressed, flexible, and Telework schedules.

MNCPPC has various work schedules and the data is kept by another office.

- 3) Advise if there is a trend, e.g. increased or decreased use of Telework and if there are informal Telework arrangements.

There are an additional 20 new teleworkers for 2012 and applications continue to be submitted.

- 4) Please advise if there are equipment, technology, security, collective bargaining, or other issues affecting Telework that you wish to share.

None

- 5) Also it seems that the use of Telework Centers has decreased so please indicate if any of your Teleworkers continue to use a designated Telework Center.

MNCPPC teleworkers do not use Telework Centers.

- 6) Provide any other facts about Telework or Alternate Work Schedule that you feel Councilmembers should know.

“Planner” is the position with the most participants in the Telework program.

*Notes taken by J. Ferber in conversation with MNCPPC staff.

HELPFUL TIPS FOR SUCCESSFUL TELEWORKING OR TELECOMMUTING

Tasks

- Plan your work assignments before teleworking. Work that is project or task-oriented works well.
- Prepare to transport or electronically transfer any potential materials you may be unable to access from an off-site location.

Equipment

- Computer and printer
- Software (compatible with office software)
- Fax/modem or fax machine
- Telephone and dedicated phone line
- Remote access software
- Answering machine, or preferably voice mail with remote access to check messages

Environment

Find a place in your home that would be an appropriate workspace. It does not need to be an entire room but it should be:

- relatively quiet and free from distractions
- an area where you can work uninterrupted, preferably with a door
- a place with good lighting, adequate heating, cooling and ventilation

If your home is not suitable for telework due to lack of space, distractions, or the availability of high-speed Internet access, consider an alternate location such as a telework center. However, please note that most telework centers require advance arrangements to be made.

Schedule and Communication

The cornerstone of successful telecommuting is good communication with your office:

- Agree on the specific hours you will be working away from the office. Having set hours and routine times for checking in with the office will help manage your telework time.
- Agree on types of work or work products to be completed
- Ask the receptionist to forward calls to you if you are unable to forward your office voicemail to your home office.

Sources:

<http://www.mwcog.org/commuter2/commuter/teleworking/index.html>
<http://www.montgomerycountymd.gov/tcotmpl.asp?url=/content/DOT/transit/commuter/page7.asp>
<http://www.e-mdot.com/Planning/Telework Partnership Web Page/Telework Partnership with Employers>
<http://teleworkva.redmon.com/forTeleworkers/success.aspx>



Montgomery County Interim Telework Program 10 STEPS TO TELEWORK

Step 1

Read the *Montgomery County Interim Telework Program Policy* and the *Montgomery County Interim Telework Program Questions and Answers* and educate yourself on telework and the County's program. If you meet all of the following criteria you are eligible to apply to telework and may proceed to Step 2: (1) are a non-bargaining unit employee, (2) are in a telework approved position, (3) have successfully completed your probationary period and have a "successful" performance rating or better, or have performed at a successful level or better under an established performance plan at a minimum of six months.

Step 2

Complete the *Telework Suitability Self-Assessment*. If you score a 27 or higher, forward the form to your manager/supervisor and proceed to Step 3.

Step 3

Meet with your manager/supervisor to discuss the results of your self-assessment and the results of the *Manager/Supervisor Assessment of Employee Suitability for Telework* (this meeting should occur within 10 days of the employee submitting the *Telework Suitability Self-Assessment* to his/her manager/supervisor). If your manager/supervisor recommends that you participate in telework training go to Step 4. If your manager/supervisor does not recommend that you participate in telework training you and your manager/supervisor should discuss the skills you will need to develop and/or enhance to be successful in telework.

Step 4

Forward the *Telework Suitability Self-Assessment* and the *Manager/Supervisor Assessment of Employee Suitability for Telework* to your Department Director. The Department Director will approve or disapprove you to participate in telework training. If you are approved go to Step 5. If you are disapproved, you and your manager/supervisor should discuss the skills you will need to develop and/or enhance to be successful in telework.

(Note: Where applicable a Division Chief/Manager may need to review the manager/supervisor's recommendation before it is forwarded to the Department Director for approval)

Step 5

Attend telework training with your manager/supervisor.

Step 6

Complete the *Manager/Supervisor-Employee Telework Agreement* with your manager/supervisor (this agreement should be completed within 10 days from the date of the telework training). One of two scenarios will result from completion of the agreement:

(1) If you and your manager/supervisor agree on a mutually beneficial telework arrangement, a copy of the agreement must be forwarded to the Department Director. The Department Director will review the materials provided and approve or disapprove you for telework; or

(2) If you and your manager/supervisor do not agree on a mutually beneficial telework plan, a copy of the agreement with a summary of the points on which you and your manager/supervisor agreed and disagreed must be forwarded to the Department Director. The Department Director will review the materials provided and approve or disapprove

you to telework; or make suggestions on the points you and your manager/supervisor disagree on to help you reach an agreement on a telework plan.

If you are approved go to Step 7. If you are disapproved, you and your manager/supervisor should discuss the skills you will need to develop and/or enhance to be successful in telework.

(Note: Where applicable a Division Chief/Manager may need to review the agreement before it is forwarded to the Department Director for approval)

Step 7

If approved complete the following forms and go to Step 8:

- *VPN Request form* (Note: Complete the VPN request form only if you need VPN access. If you request VPN access and are disapproved you will need to determine how to meet the VPN requirements or re-evaluate the work you will perform while teleworking, i.e., performing tasks that do not require VPN access. Be sure to read the *Technology Requirements & Procedures* form and use the form to determine your technology needs for telework.)
- *Work Space Self-Certification Checklist and Safety Guidelines for the Telework Location*
- *Telework Work Location and Schedule*
- *Information for Data Collection*
- *Telework Agreement and Disclosure of Binding Terms*

Step 8

Use the *Telework Forms Checklist* to make sure you have completed all of the application materials. Make 2 copies of all application materials. Forward the original set to the Telework Coordinator in the Office of Human Resources, forward a copy of the set to your manager/supervisor and keep a set for your own records.

Step 9

Create a telework work plan and submit it to your manager/supervisor for review. (Note: Although this is optional, employees are strongly encouraged to complete the *Work Plan Template*. Your manager/supervisor may require you to submit regular status reports to help judge work performance)

Step 10

Begin teleworking.

TELEWORK PROGRAM FORMS CHECKLIST

Please use the following checklist to ensure that you have completed the required telework forms prior to submitting original copies of your telework application materials to the Office of Human Resources.

- Telework Suitability Self-Assessment
- Manager/Supervisor Assessment of Employee Suitability for Telework
- Manager/Supervisor-Employee Telework Agreement
- Workspace Self-Certification Checklist and Safety Guidelines for the Telework Location
- Telework Work Location & Schedule
- Information for Data Collection
- Telework Agreement and Disclosure of Binding Terms
- Technology Requirements and Procedures
- Telework VPN Access Request Form

News Articles

11-2-12	Stuck at Home? Tips for Working	<i>The Wall Street Journal</i>
10-30-12	Could Sandy Give Teleworking A Boost?	<i>The Washington Post</i>
10-21-12	Working from home grows in popularity across area	<i>The Washington Examiner</i>
9-18-12	Teleworking trends gain momentum in private sector	<i>Unified Communications</i>
9-10-12	Telework guru takes phoning it to new levels at patent office	<i>The Washington Post</i>
8-12-12	Derecho blackouts demonstrate the need for more federal telework options	<i>The Washington Post</i>
7-18-12	Telework points to management issues in and out of the office	<i>The Washington Post</i>
7-13-12	Teleworking: A good but still-struggling idea	<i>The Washington Post</i>
7-9-12	Telework is a work in progress	<i>The Washington Post</i>

Stuck at Home? Tips for Working

By Rachel Emma Silverman

Talk about flexible work arrangements.

With commutes in a snarl and many offices made inaccessible after Superstorm Sandy, scores of New York-area workers have turned their homes into makeshift offices, holding conference calls from their couches, conducting deals over Skype and reading spreadsheets on their iPhones, sometimes with needy toddlers in tow.

About 3.1 million Americans work from home exclusively, with many more working remotely at least part-time, according to the Telework Research Network. Those numbers are swelling, at least for the time being, as businesses try to keep going with employees dispersed by the storm.

Working productively from home takes more effort than flipping open a laptop and plopping down at the kitchen table. Telecommuting “needs to be practiced” to ensure a business can truly run even when the office is unavailable, or when workers are waylaid, says Kate Lister, president of Global Workplace Analytics, a workplace research firm.

Here are some tips for staying productive when signed on remotely:

Make room for work. Having a quiet, dedicated space to do work is key for productivity, say veteran telecommuters, whether it's a desk in a guest room or a card table set up in an alcove. Steer clear of high-traffic areas such as the

Working from home takes more effort than flipping open a laptop and plopping down.

kitchen or kids' playrooms.

Get out. No space, power or Internet access at home? Leave, if you can, for a coffee shop, co-working space or even a hotel lobby. In and around New York City this week, people are locating places to do work using the Twitter hashtag #sandycoworking. National workspace locaters Loosecubes and LiquidSpace, and workspace provider Regus, also have databases of available workspaces in many communities, including New York.

Go to the Cloud. A cloud-based file storage system has helped ShopKeep POS, a retail technology start-up with offices in Lower Manhattan, to maintain business as usual while the physical office remains offline due to power outages. The company's 30 or so workers have been able to access files remotely and are staying in touch over email and group chat program Campfire, says Sandhya Rao, ShopKeep POS's vice president of marketing and sales.

Call the baby sitter. Working from home while looking after a child isn't impossible, but it comes close. Kayli Harding, human resources manager at consulting firm Kalypso, telecommutes from her Dallas home and

takes advantage of naptime, using the four hours a day her infant son naps for conference calls and uninterrupted work. More advice for those working while kids are home: Your phone's mute button is your best friend.

Limit email. Staying in constant touch doesn't boost telecommuters' feelings of closeness to their co-workers. Chatty interruptions even caused workers to feel more stress and cut into their work flow, found Kathryn Fonner of the University of Wisconsin-Milwaukee, co-author of a recent study. To reduce email chains, try document-sharing and project-

management tools such as Google Drive, Asana or Basecamp.

Mind the communication gaps. Without in-person cues, such as gestures and facial expressions, managers need to be on the lookout for miscommunications, such as confusion over assignments, and should be willing to pick up the phone or schedule a video chat with staffers—especially when there are delicate issues to resolve, says Wharton management professor Sigal Barsade.

Check in. Make regular appointments to connect with managers and peers for status updates and to keep projects—and your career progress—on track. Doing so helps “dissipate that sitting-on-the-sofa-eating-bonbons impression” some bosses have of remote workers, says Ms. Lister. Managers must set clear expectations and evaluate employees on productivity, not presence, adds Joshua Billington, of Telework Advocacy, a group that advocates for remote workers.

Set office hours. Telecommuting often lets workers tailor shifts to their needs and habits, but managers and workers need to clearly agree on the hours they're expected to be on duty. Setting regular hours also prevents work from bleeding into family time, and may divert you from household distractions like the laundry pile.

Go out for lunch. Defuse feelings of home-based isolation by meeting with colleagues or clients. Remote workers often have better focus and greater productivity than office workers, but a recent Conference Board report found they sometimes feel out of the loop, and are prone to burnout from the blurry lines between home and work.

Make breaks productive. Storm-tossed telecommuters may be less productive than others, given spotty Internet connections, power outages and less-than-optimal home technology. Take tech-related downtime to tackle offline tasks, such as to-do lists, phone calls or catch-up reading.

Plus:

Track what's not working. Managers and workers should note any major tech snafus or security problems for future emergencies—and make sure that emergency contacts and security protocols are in place for the next unexpected event. Consider holding occasional “telecommuting drills” to make sure that workers are able to hack it from home, suggests Ms. Lister.



Sandhya Rao

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Pg. B4

Federal Diary

Could Sandy Give Teleworking A Boost?

By Joe Davidson

Sandy is sitting on the federal government like a huge, wet and windy blanket, a killjoy if ever there was one.

Yet, despite the storm that has closed government offices along the East Coast, stopped transit systems and forced residents to hunker down in their homes, some work of the government continues to get done. A good chunk of federal employees are working while their colleagues have the day off Tuesday, for the second straight day.

Emergency personnel, of course, work no matter what. Increasingly, those who are not considered emergency personnel are in a position to work from home. Offices closed not just in Washington but also in Baltimore, Philadelphia, New York and Boston.

"The first and most important issue is making sure we can protect the safety of our employees," said John Berry, director of the Office of Personnel Management.

The OPM estimated that about one-third of almost 300,000 federal employees, including emergency staff, in the D.C. area telework when government buildings close because of weather.

But according to the OPM's latest annual "Status of Telework in the Federal Government" report to Congress, issued in June, less than 8 percent of federal employees telework regularly.

If so many employees can telework when storms close D.C. offices, why don't more telework on a regular basis?

The OPM report cites "management resistance" as the primary barrier to teleworking, closely followed by technology. But if technology is such an important barrier, how can such a significant percentage of federal workers in the D.C. area telework during storms?

"It is very telling that the federal government appears to have the capacity and capability to go from 8 percent of employees teleworking to approximately 33 percent when the continuity-of-operations plan is put in place," said Rep. Gerald E. Connolly (D-Va.), a sponsor of the Telework Enhancement Act, which was designed to facilitate telework in the federal government. "This indicates that one of the major barriers to more robust teleworking by a significant segment of federal employees is management-related and not due to technology constraints. We still have a mind-set among some federal managers that 'if I can't see you, you must not be working.'"

The OPM is "working closely with agencies to break down these barriers and improve telework opportunities in the federal government," said Thomas Richards, an OPM spokesman.

Cindy Auten, general manager of Telework Exchange, an organization that promotes teleworking, said that "many positions that would not be eligible for regular telework would be eligible to telework during a natural disaster. Just like we are seeing with Hurricane Sandy, maintaining operations is absolutely critical - and telework can have a major impact.

"That being said, this presents a great opportunity for employees to have that conversation for more regular telework," she added. "Some middle managers are still waiting to see if telework is a storm that will pass or will it be integrated into standard operating procedures."

Teleworking was a central component of Berry's decision to close offices in the metropolitan D.C. area because of Hurricane Sandy. The office closing notices issued by the agency said that excused absences allowed for non-emergency employees did not apply to those "required to telework."

Teleworkers don't get administrative leave on a bad weather day. If they don't want to work, they have to take a vacation day.

"Telework-ready employees who are scheduled to perform telework on the day of the announcement or who are required to perform unscheduled telework on a day when

federal offices are closed to the public must telework the entire workday or request leave, or a combination of both," according to the OPM announcement.

Berry said he received hour-by-hour weather reports before deciding to close government offices. At one point Saturday, he considered closing for a half day on Monday.

But with predictions of dangerously high winds Monday afternoon and the possibility that Metro would not operate (the transit agency said it would not operate shortly after OPM announced its decision to close), Berry said his decision to close D.C. area offices was an easy one.

"I didn't want to risk a situation where you'd have to bring people in and then have to shelter in place," he said. But as the weather predictions got worse, the thought "of trying to get a half a day was . . . off the table in terms of public safety."

Keeping the government running also is a consideration.

"We have a responsibility to the taxpayer to keep the government open as much as we possibly can," Berry said.

But that doesn't trump safety.

The decision to stay open or close in other cities is made by local Federal Executive Boards, which coordinate the activities of federal agencies.

How much does it cost the taxpayer when government offices close?

"There is no good way for us to calculate with any accuracy the cost of closing federal government buildings," Richards

said. "New technologies allow federal employees to work from home and some will find ways to make up their work at no cost to the federal government."

Safety also includes securing all construction sites, covering manholes and placing sandbags in certain areas, such as the Federal Triangle, according to the General Services Administration. As of mid-afternoon Monday, the GSA reported no damage to federal facilities.

"We have personnel monitoring buildings and reporting continually on status and impacts throughout the storm," said GSA spokesman Dan Cruz.

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The Early Bird is prepared by the Current News Service of the Office of the Assistant Secretary of Defense for Public Affairs (OASD-PA).

BUSINESS

Working from home grows in popularity across area

By Liz Essley
Examiner Staff Writer

More people than ever have become stay-at-home workers.

The U.S. Census Bureau says the number of telecommuters, workers who most days go off to the office in their pajamas, is on the rise in the D.C. area and nationally.

The percentage of people in the United States working exclusively from home went up from 4.8 percent in 1997 — more than 6 million people — to 6.6 percent, or more than 9 million people, in 2010, the Census Bureau said.

The number of workers who spend at least one day at home also went up, from 7 percent to 9.5 percent of the work force.

One reason for the up-tick is that technological improvements have made it much easier, and feasible, the report shows.

In the D.C. region, about 141,634 people, or about 4.9 percent of the work force, worked from home most of the time in 2010, according to the Census Bureau. That's up from 109,072 in 2005.

Those numbers are lower than results from a 2010 survey by the Metropolitan Washington Council of Governments, which showed that about 600,000 people in the congested Washington region telecommute at least occasionally.

The council's Nicholas Ramfos said the differences may have been caused by differences in how the surveys were conducted or what

areas were included in them. But, he said, one thing is clear: Telecommuting is growing, and that's good for the region.

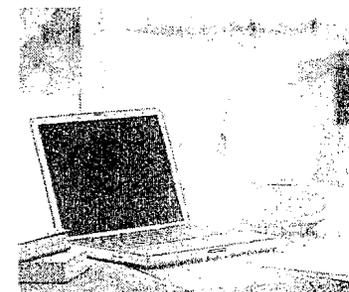
"It helps reduce congestion and improves air quality," Ramfos said, adding that it also benefits companies by boosting productivity and giving workers flexibility. "Employee morale goes up a little more when you don't have to sit in traffic for three hours a day."

Herndon resident and Advisory Board Co. employee Pete Simpkinson, of Herndon, started

teleworking in 2011. The media relations director for the Advisory Board Co., a health and higher education consulting firm, swapped telecommuting for what had been an 80-minute drive and Metro ride to his D.C. office.

"I'm in a role where it's just as efficient for me to telework as it is for me to be in an office on a daily basis. And it helps with my work-life balance," he said.

He says his company selects workers to telework on a case-by-case basis, but that it makes him



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About 4.9 percent of the D.C. area work force worked from home most of the time in 2010, the Census Bureau said.

more productive.

"In the morning," he said, "I can be responsive right out of the gate."

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Teleworking trends gain momentum in private sector

Subscribed by Teo UC News on Tuesday, September 15, 2012

Advances in telecommunications have made it so employees no longer have to leave their homes and physically travel to work anymore. This ability, commonly known as teleworking, is becoming more popular in the private sector thanks to the proliferation of mobile devices and unified communications systems.



The adoption of bring your own device (BYOD) programs in the enterprise is particularly driving teleworking trends, enabling employees to be more productive from anywhere at any time, according to a CIO report.

In addition to BYOD and the growing use of smartphones, tablets and other gadgets in the workplace, there are other factors contributing to remote working habits.

Teleworking benefits

By eliminating the need to travel to work and meetings, companies can be more efficient during the ongoing macroeconomic crisis, which is putting pressure on a lot of firms to implement anything they can to reduce expenses, CIO noted. It is no longer important to enterprises to confine workers to a centralized location, especially when not doing so can eliminate unnecessary expenses, including the maintenance of on-site equipment.

The evolution of the digital world has also made it so businesses are required to be open around the clock, meaning many employees need to be able to collaborate outside normal hours, CIO said. This often introduces much more stress to the everyday worker, creating an unequal work/life balance. By adopting teleworking programs, however, individuals can perform work-related tasks from home, strengthening satisfaction and overall productivity.

Teleworking is also appealing to the next-generation worker who was raised on technology, CIO reported. This helps companies generate a competitive advantage over rival firms that neglect to adopt unified communications and BYOD programs, which is especially important in today's cutthroat business world.

A separate study by Wakefield Research echoed the growing need for unified communications in today's evolving business environment that is slowly migrating away from traditional practices. Even small businesses are embracing teleworking, as nearly one-fourth of respondents said their company relies on telecommuting.

"The results demonstrate the extent to which telephone and video conferencing have become ingrained in the work habits of small business owners, since nearly half of the survey respondents say traditional, in-person meetings are becoming less relevant," collaboration expert Glenn Bray said.

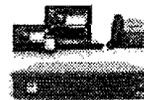
As the private sector continues to adapt to technology, it will become increasingly important that organizations of all sizes leverage unified communications and other next-generation solutions to remain competitive.

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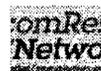
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Telework guru takes phoning it to new levels at patent office

By [Lisa Rein](#), Published: September 10

Not so long ago, workers around Washington were stuck in the Dark Ages of office life.

They slogged through long commutes on traffic-choked highways.

Bad weather kept them from the office, and productivity took a hit. The region's air quality suffered. The cost of office space edged up.

Then came telework. Employees in the private sector started firing up their computers at home more, some doing their jobs in their pajamas.

But in a federal government culture with a high premium on showing up at the office, telework has been slower to take off. About one in four federal employees whose jobs lend themselves to telework, actually do it. And more than half of those just one or two days a week.

The exception is the U.S. Patent and Trademark Office, where Danette Campbell is the booster for a government work-at-home program that's set the gold standard in a culture that has been pushed to change.

The agency issues patents to inventors and businesses and trademarks for products and intellectual property. But some employees step foot in the Alexandria headquarters just once or twice a year. Of

11,000 employees, 66.3 percent telework, mostly patent reviewers and trademark examining attorneys across the country. Almost 4,000 work from home four or five days a week. Compare that with 8 percent across the federal workforce.

The 2010 telework law requires every federal agency to have someone in Campbell's role, but she's the only full-time coordinator. Since she came in 2006, the number of teleworkers has tripled.

"Just because you're working remotely doesn't mean you're not part of the agency," she said, flashing a Cheshire cat smile. "It's all about the end product."

The Patent and Trademark Office is able to quantify that productivity. Experts in fields from engineering to physics review applications, sign off or not, then move on.

Campbell is one of five finalists for this year's Samuel J. Heyman Service to America Management Excellence Medal. Director David Kappos cited her "contagious enthusiasm and incredible work ethic" in the nomination.

At 61, when many people are ending their careers, Campbell is in the heyday of her fourth. She has been an elementary school teacher, stay-at-home mom, internship coordinator for college students and now, work-at-home proselytizer.

Campbell's mission as a GS-15 is to smooth the path from office to home. She sets up employees with laptops, webcams, videoconferencing software and gives them and their bosses training in how to stay in touch. More and more managers are teleworking, too.

Another big part of Campbell's job is to collect statistics, some of which are encouraging. A report in February by the inspector general for the Department of Commerce, the patent office's parent agency, called the telework program a "successful business strategy" that saves \$17 million a year in office space costs.

The average teleworker spends 66.3 more hours a year examining patents than the average reviewer at headquarters, the report found. That translates to about 3.5 more patent reviews. Teleworkers also use less sick and administrative leave and spend less time on administrative tasks, the inspector general found.

All teleworkers sign a contract setting out the ground rules for working independently. In addition to having few or no distractions, and being more productive, telework eliminates the daily commute.

Campbell teleworks one day a week from her century-old home in La Plata.

"I'd rather not think about" a commute, she said, adding, "Working from home enables me to get online earlier and work later."

The boost in efficiency also has a "small, but nonetheless positive effect" on reducing the office's most stubborn problem, a backlog of 620,000 patent applications.

Telework is not for everyone. It can be isolating. Work and home life don't always mix. But the Patent and Trademark Office is seeing its benefits: Faster work, better recruitment, savings in office space costs. And, advocates claim, better air quality with fewer cars on the road.

Elaine Ryan recalls Campbell's first step into the new office culture in the late 1990s, running a federal telework program administered by the College of Southern Maryland.

"She's shy and retiring," Ryan, now provost of the college's Graduate School USA, joked about Campbell.

Her former colleague, Ryan knows, is anything but. She's a lively persuader.

"The idea is, 'I'm not watching you right now, but you have a product you have to generate,' " Campbell said in her Alexandria office, where a malfunctioning webcam that loops teleworkers across the country into meetings was getting repaired. On her bookshelf sit titles such as "Managing the Telecommuting Employee" and "Managing the Mobile Workforce."

The patent program started in 1997 as a pilot for 18 examining trademark attorneys around the country. Back then, telework was a scary word. But after a while, managers in Alexandria saw something astounding: The attorneys worked more. They were happier.

At the time, Campbell was in Southern Maryland, working with local officials and the General Services Administration on a novel effort to allow federal workers from the area to avoid commuting. They worked out of rented space near home — but not at home.

By today's standards, the setup was crude. But there were conference rooms, desktops and high-speed internet service few employees had at home. They were called "telecommuting" centers.

Campbell calls it the "steppingstone" stage of telework.

"The local Chamber of Commerce said to me, 'You know, Danette, this concept is never going to take off,'" she recalled. " 'Managers are never going to buy into it.' "

"My whole argument was, 'You wait and see. The technology is exploding.' "

The program did, too, but the challenge was clear.

"It was getting people to recognize their own mythology they've been living with," Ryan said. "Just because you can see somebody at their desk doesn't mean you know what they're doing."

Campbell had a touch for empathizing with their concerns, Ryan said, "then moving them to a different place."

Campbell then took a job with the Council of Governments, where she pushed employers in the region to launch telework programs.

"It really was a sales job," recalled Nick Ramfos, director of COG's Commuter Connections program. "A behavior change is what you're selling. You need a certain power of persuasion to get folks who are really skeptical to sign on. Danette was good at that."

And the trademark program was noticing. Up in Alexandria, it was expanding to patent reviewers, who started giving up their offices. They "hoteled," meaning that they had to book a desk when they came to headquarters. By 2006, 2,271 employees were working outside the office from one to five days a week.

“That’s when we realized we needed to have somebody to run this full time,” recalled Trademarks Commissioner [Deborah Cohn](#).

The agency approached Campbell, who liked the idea of expanding one successful program for the federal government.

The biggest downside to telework is isolation, say Campbell and her colleagues. They’re working on solutions: lunches for employees who live near each other, other social events to keep them engaged. At meetings, everyone who needs to be there is webcasted in.

“I think that’s the biggest negative to telework,” Cohn said. “When you compare the negatives and positives, the positives come out ahead.”

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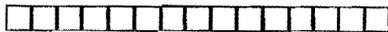
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Derecho blackouts demonstrate the need for more federal telework options

By Sudhir Verma, Published: August 12

In the event of a disaster — whether natural or otherwise — most government IT directors think first about protecting the data centers.

This is a reasonable reaction, of course. But in the aftermath of the recent derecho and the spate of weekly storms that have continued to affect the region with power losses that last hours — or in the case of the derecho, days — the efficiency of agencies and businesses is at stake. It's time to take a fresh look at telework as an important aspect of disaster recovery and continuity of operations policies.

After all, the Telework Act of 2010 indicated that telework is a useful strategy to improve continuity of operations to help ensure that essential federal functions continue during emergency situations.

However, the concept of telework in general has been more closely associated with personnel benefits, such as cutting commuting costs and improving work-life balance. I believe, however, that the time has come for a telework mind-set change. Certainly, it promotes convenience and efficiency, but not until agencies view telework as a critical aspect of disaster recovery will it take hold in a meaningful way.

Consider the numbers. A recent Office of Personnel Management report to Congress said 684,589 of 2.1 million federal employees are eligible to telework. But at the end of the federal government's last fiscal year, the report said, only 168,558 had actually begun teleworking or were set up to do so.

Why the gap? Obviously, telework implementation has not been addressed with the same sense of urgency as perhaps data center protection and recovery. The problem is that protecting the data is only half the equation.

In the event of a disaster or disruption, what good is protecting the data if employees can't access information? This issue becomes more important as more and more data centers consolidate and agencies operate from locations across the metro area, farther and farther away from their data centers.

For example, an agency might have operations in Woodbridge, Herndon, the District and Aberdeen. If a weather event renders the offices in Virginia inaccessible, employees need a telework program in place to continue working with colleagues.

Here's the call to action: Government IT directors and CIOs should take this time in the aftermath of recent weather events to reassess their disaster recovery policies. They need to ensure not just that data centers are being protected, but that data can be accessed. Data access points must be reassessed and scrutinized. Telework should be recognized as an amazing tool to provide effective disaster recovery and continuity of operations.

Plenty of agencies are setting a good example already. The General Services Administration had to close its headquarters in the District because of power outages in the wake of the derecho. But a large majority of employees were able to telework until the issue was resolved.

The first step for any agency to get started with telework is to simply identify the eligible workers in the organization and start a proof of concept program. Agencies, including the GSA and Bureau of Alcohol, Tobacco and Firearms, have excellent programs already in place. IT leaders in other agencies should reach out to their colleagues at GSA and ATF and simply ask what they did to get started.

In the event of a disaster, telework could mean the difference between an agency that is functioning effectively and providing critical services, and one that is shut down.

Sudhir Verma is vice president of consulting services at Crofton-based data company [Force 3](#).

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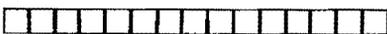
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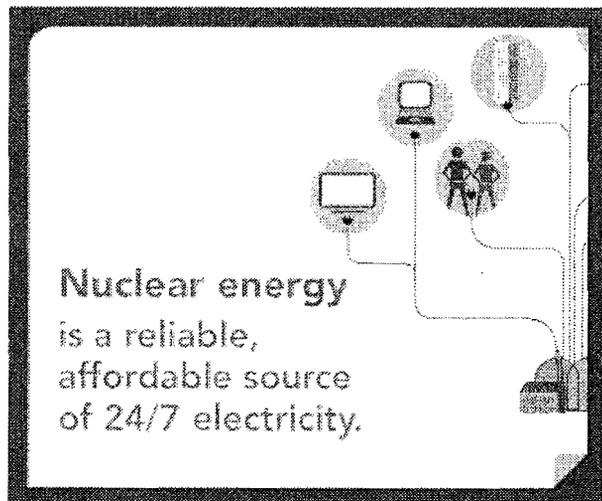
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Telework points to management issues in and out of the office

By [Joe Davidson](#), Published: July 18

Reader reaction to a Federal Diary [column](#) on an Obama administration report gives life to the document's findings on impediments to teleworking.

The Office of Personnel Management's (OPM) annual [report](#) on the "Status of Telework in the Federal Government," says "management resistance" is the most frequently cited barrier to implementation of telework in federal agencies, closely followed by technology issues.

What reader reaction points out more graphically than the report is really a larger managerial problem in federal agencies. The issue is not just being able to manage telework, it's an issue of being able to manage performance generally.

Consider these comments:

From a Department of Veterans Affairs manager who did not want to be identified:

"First, government has historically managed employees' work by time, not product. The entire structure of personnel management in government has been built around whether the employee was at work during duty hours, not to whether or not they actually produced a product.

"Making such a big change as this is both a structural change (changing and adjusting the working rules)

and a cultural one (changing the way managers and employees interact). It cannot be done overnight. The only way to determine if a teleworker has accomplished anything requires that the employee report on their daily work efforts and for the manager to hold them accountable for it. I know of no manager in my office who has done this.”

A Patent and Trademark Office (PTO) worker, whose e-mail handle is “Ziggy 101,” said “one of the reasons teleworking works for the PTO is that we are a production based system with very definite goals and deadlines each bi-week, quarter and fiscal year. The production goals are set and there are consequences to not making these goals. Yes, people do get fired. Having worked at another government agency where the measurement of work and goals was not as clear, I can understand why some would find it difficult to understand how you would measure someone’s work at home.”

Said “Whazzis:” “I agree that managers need to learn how to manage. Most have no clue what their employees are doing in the office and don’t seem to care. So when the employee works from home, suddenly the manager is ‘worried’ about whether the employee is productive.

“News flash to managers — you should be tracking the productivity of ALL your employees at least once/week. That would help you learn which are slacking off while in the office and reward those who are efficient.”

William L. Bransford, general counsel of four federal managers organizations, said training is key to getting greater management buy-in for telework. Training can help overcome the worry of some supervisors that they won’t be able to withdraw teleworking from employees if their productivity falls.

He said telework agreements between management and staffers, such as those outlined in OPM’s “Guide to Telework in the Federal Government,” help allay managerial concerns. The agreements can be for a six- or 12-month period, allowing the arrangement to be canceled if it is not working out. “[T]elework agreements should be well-written, jargon-free, practical, and clear regarding responsibilities, roles and expectations,” according to the guide.

Some federal labor unions have written telework agreements with agencies.

National Treasury Employees Union President Colleen M. Kelley said that, under an IRS agreement that takes effect in October, “requests from eligible employees for ‘frequent telework’ will normally be approved, unless work demands dictate otherwise.”

William R. Dougan, president of the National Federation of Federal Employees, said including employees early in telework decisions is key to overcoming management resistance. “The more employees’ concerns are brought into the implementation process, the smoother the transition will be,” he said. “Agency and facility-level labor-management partnership councils would be an ideal forum to get the stakeholders together and work toward a consensus.”

Managers at agencies with good teleworking programs agree on the need for communication.

“It’s really important to have that conversation about clearly defining performance measures,” said Danette R. Campbell, PTO’s senior telework adviser. “As long as expectations are clearly defined, it really does not matter where the worker is located.”

Added William D. Spencer, clerk of the Merit Systems Protection Board: “Ultimately, our productivity stays the same regardless of where people physically do their work, and we watch those numbers very

closely as part of MSPB's and individuals' performance."

One manager, identified with the e-mail handle "lancecope," can't understand fellow supervisors "who simply couldn't trust their employees" to be productive away from the office.

"Either a report is finished and on time or it isn't etc.," "lancecope" said. "It's easy to establish measurable performance goals for many jobs, especially [administrative] support that does not involve the public."

But if it's easy, why don't more managers do it?

Previous columns by Joe Davidson are available at wapo.st/JoeDavidson.

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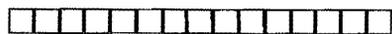
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Teleworking: A good but still-struggling idea

Published: July 13

We asked:

How is teleworking at your agency? Are you eligible? If you telework, what is the experience like? If you don't telework but would like to, what's holding you back? If you're in the Washington metropolitan area, where a storm recently knocked out power, were you among those who teleworked? How did it go?

You said:

My position at the Department of State deems me eligible to telework. We receive strong resistance to allow us to telework. Only when the Office of Personnel Management declares unscheduled telework days can we telework. On those days that OPM declares unscheduled teleworking, I have found it productive and less stressful. I was on scheduled leave during the most recent storm that hit the Washington metropolitan area. I had power and so did many of my co-workers who did telework.

I don't understand the resistance from some managers. They don't seem to understand the benefits of teleworking to the government and the department.

Meta R. Fitzgerald

State Department

Clinton, Md.

I work for the National Institutes of Health. Outside of a regularly scheduled one-hour meeting each week, I could do my job totally from my home computer.

My department formally implemented a telework policy last year that allows us to work from home on an ad hoc basis. However, some supervisors in our department let their staff work from home frequently while others, like mine, enforce a stricter definition of "ad hoc."

I have expressed interest about working from home on a regular basis, say one day a week to start. I was told by my supervisor not to bother applying for that because our department head is very much against it. He apparently thinks everyone should live close to their job. That's kind of hard to do when you work in Bethesda and your wife works in Baltimore. Anyway, I spend an average of two hours driving back and forth to work every day from Columbia, time that could be used for many more constructive (and less destructive) things. Saving money on gas would be a nice bonus, also. I just get irritated when I hear news reports about the government expanding its telework policies, when in my department nothing changed — they were just forced to make it official with paperwork, but they're still against teleworking.

Name withheld

National Institutes of Health

Bethesda

Although teleworking sounds logical, no one has done a cost-benefit study on whether it has created work efficiencies and lowered costs. In some personal cases it works well — I am grateful for it myself on occasion. But what is good for an employee may not be good for the agency. As a non-manager, I have seen negatives that no one has accounted for.

Here are some:

First, government has historically managed employees' work by time, not product. The entire structure of personnel management in government has been built around whether the employee was at work during duty hours, not whether they actually produced a product. Making such a big change as this is both a structural change (changing and adjusting the working rules) and a cultural one (changing the way managers and employees interact). It cannot be done overnight.

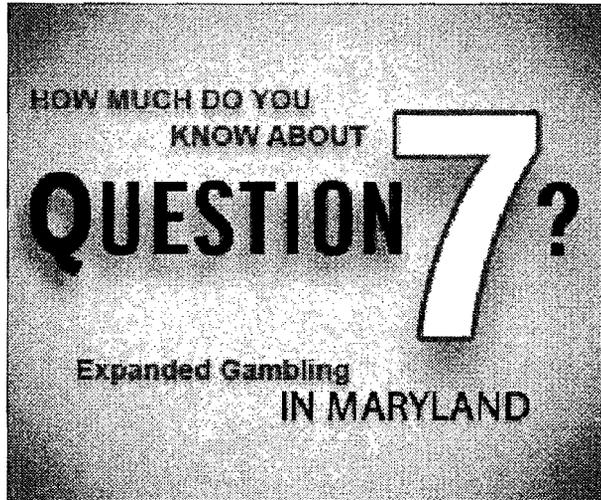
Second, the claim that government will save money on physical space may be true over time, but it is unlikely today. A year ago my office moved to a new location with a multi-year lease. Then telework was announced, and now many cubicles are empty most of the time. Rent is still being paid whether we are here or not.

Third, there are many scientific studies that show communication is best when done face to face, as visual, auditory and physical cues work together to enhance meaning and comprehension.

Fourth, government has never been known for its efficiency, and home distractions and IT infrastructure can create two more impediments to productivity when teleworking. Without work metrics, how would a manager know if the activities of two small children, a wife, and two elderly parents (as one teleworking co-worker has at home all day) make him less productive than at the office?

The Washington Post

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Telework is a work in progress

By [Joe Davidson](#), Published: July 9

Teleworking makes sense — dollars and cents.

Promoting the ability of federal employees to work from home can reduce government overhead, improve employee work-life balance and allow work to continue when government offices need to close.

Yet many who could, don't.

It doesn't work for every government gig, but it almost certainly is a good idea for more federal workers than (1) those who are allowed to use it and (2) those who do use it.

An [Office of Personnel Management \(OPM\) report](#) on the "Status of Telework in the Federal Government" indicates that 32 percent of federal workers are eligible to telework. Of those, fewer than 25 percent actually teleworked in September. OPM doesn't know how many employees teleworked during the recent period of storms and heat.

The [Patent and Trademark Office](#), where nearly two-thirds of employees work from home, has long been in the forefront of teleworking among governmental agencies.

"Telework is a well-accepted business strategy and a large part of our culture," said Danette R. Campbell, the agency's senior telework adviser. "Managers realize the positive impact this strategy has on real estate cost-avoidance, production, recruiting and retaining a highly skilled workforce, and

continuity of operations.”

That’s not always true across government.

Certainly, many jobs are not compatible with working from home. Nonetheless, government-wide figures reflect a continuing and unnecessary reluctance by supervisors who believe they can’t manage those they can’t see.

“For many managers, reluctance to allow telework is rooted in uncertainty about managing individual performance,” said Justin Johnson, OPM’s deputy chief of staff. “Telework requires a new mind-set, and it changes the dynamics of the work and the workplace in ways that not everyone feels competent to manage. All managers need to get more comfortable with managing by results rather than process and time in the office.”

On paper, teleworking plans look good.

In the report’s introduction, OPM Director John Berry said agencies representing more than 99 percent of the federal workforce have included telework “as a critical component of their agency Continuity of Operations Plans,” which would be used to keep the government operating “through hazardous weather, pandemic or physical attacks that would result in the closure of Government buildings.”

“Telework can make employees more efficient, more accountable, and more resilient in emergency conditions,” Berry wrote in the report.

But a long-standing problem remains: “Not all managers are comfortable directing employees who telework,” he added.

The telework law was designed to foster a more consistent and systematic program for government telecommuting. Yet the amount of telework varies significantly from agency to agency. Some of that is because of the nature of the work, and some is because of managerial resistance.

Although a great deal of attention has been paid to the benefits of teleworking, less than a third of federal employees are eligible, according to the report. Of those, 21 percent have a telework agreement in place.

“[A]s often happens when innovations are introduced, Federal telework faces barriers to full implementation,” the report says. “Asked to describe ongoing challenges, several agencies reported resistance among key stakeholders (e.g., managers) as well as technology and security concerns.”

Patricia Niehaus, president of the Federal Managers Association, said the main reasons for that resistance are a lack of telework training and worries that managers won’t be able to discontinue telework if necessary.

“Both managers and employees need to be trained on how to handle assignments and accountability under telework,” she said.

Some departments with low teleworking rates, such as Veterans Affairs and Justice, said the duties of many employees are not compatible with teleworking, even if they are officially eligible.

Though only 2 percent of VA employees teleworked in September, according to the report, a VA

statement said the agency’s “ad hoc telework policy ensures participation on those days and for those circumstances where it is workable.”

At the Defense Department, where 5 percent of employees teleworked in September, “our goal is to increase the visibility and usage of the telework program and to shift the culture toward one that is increasingly accepting of telework as an acceptable way of doing business for those in eligible positions,” said the department’s Leslie Hull-Ryde.

Culture can be hard to change.

As Berry pointed out, “Not all managers are comfortable directing employees who telework.”

Are you eligible to work from home but you don't do it? Tell us why.

Previous columns by Joe Davidson are available at [wapo.st/JoeDavidson](#).

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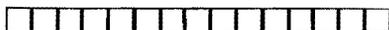
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Telework/Alternative Work Schedules Program Timeline: 2007-2012

Documents

September 26, 2007: Memo from Joseph Adler to Tim Firestine: Telework Policy Update

November 13, 2007: Memo from Joseph Adler to Duchy Trachtenberg: Montgomery County's Telework Program

March 27, 2008: Memo from Susan D. John to Management and Fiscal Policy Committee: Update Interagency Telework Initiative

- Montgomery County Telework Program Interim Policy
- Montgomery County Interim Telework Program Questions and Answers

September 10, 2008: Memo from Timothy L. Firestine to Executive Branch Department Directors: Alternative Work Schedules

April 28, 2009: Transportation, Infrastructure, Energy, and Environment Committee:

- Shifted \$50,000 from executive's recommended telecommuting dollars to continue consultant assistance in the Office of Consumer Protection.
- No additional dollars spent in FY09 or FY10 for equipment to be used by employees for telecommuting (deferred \$97,500)
- P/T OHR Specialist to Manage Telecommuters (deferred \$34,480)
- Alternative Work Week/Telecommuting Survey Results
- As a follow-up to this meeting, Action Plan Developed by OHR
- Part-time Telework Coordinator Position advertised and over 130 applications rated. Five candidates interviewed but due to on-going Reduction in Force no candidate was selected and position was eliminated due to fiscal constraints.

October 26, 2009: Memorandum from Joseph Adler to Duchy Trachtenberg: Telework Update

May 7, 2010: Memo from Joseph Adler to Executive Branch Department Directors and Affected Managers: 4/10-Hour Workweek Alternative Work Schedule Program

June 25, 2010: CountyStat evaluates Alternative Work Schedule Implementation and provides analysis and recommendations.

September 1, 2010: Memo from Joseph Adler to Executive Branch Department and Office Directors: June 2010 Alternative Work Schedules Report

July 1, 2012: New Montgomery County-MCGEO collective bargaining agreement language in effect establishing joint committee to develop county-wide (MCGEO bargaining unit) Telework program



OFFICE OF HUMAN RESOURCES

Isiah Leggett
County Executive

Joseph Adler
Director

MEMORANDUM

September 26, 2007

TO: Tim Firestine, Chief Administrative Officer

FROM: Joe Adler, Director, Office of Human Resources 

SUBJECT: Telework Policy Update

Montgomery County during the Duncan administration, committed to the Metropolitan Council of Government's (COG) and the County Council a goal of 20% of eligible employees to participate in a telework program. In addition, the County Council's MFP committee requests an annual update in October, 2007 on the status and progress of Telework in Montgomery County Government. We are at a cross road; with the change in administration, we need to reestablish our commitment with the senior management team and enlist your support and direction for Telework in Montgomery County. The following is provided as background.

In 2005, the Human Resources Directors of Montgomery County, Montgomery County Public Schools, Montgomery College, Maryland-National Capital Park & Planning Commission, WSSC and Housing Opportunities Commission developed an interagency operational plan which addressed important issues surrounding integration of telework including goals, objectives, definitions, guidelines, position eligibility, employee eligibility, safety of off-site work space, schedules, program outcomes, and measures.

Montgomery County Government established an interdepartmental telework committee consisting of managers from the departments of Health and Human Services, Public Works and Transportation, Finance, Technology Services, Management and Budget and the Office of Human Resources. This interdepartmental team addressed Telework policies and procedures and defined the criteria to determine if a position and an employee meets the eligibility requirement.

The interdepartmental telework committee developed the following material:

- Interim Telework Program Policy
- Work Agreement and Disclosure of Binding Terms
- Selecting Positions Eligible for Telework
- 10 Steps to Telework
- Telework Suitability Self-Assessment for employees and supervisors
- Workspace Self-certification Checklist and Safety Guidelines
- A list of non-bargaining unit positions eligible for telework approved by their departments.

In addition, we have offered numerous manager briefings on the benefit of Telework and have piloted Telework in the Department of Public Works and Transportations, Division of Transit Services. Although there are challenges to implementing telework, alternative work arrangements such as telework can be used to attract and retain employees and further the County's commitment to staying competitive with private and public sector employers in the DC metro area. Your direction and support of the telework initiative is critical at this point.

Please let me know if you would like OHR to set up a meeting to discuss this matter in further detail.

cc: Fariba Kassiri, ACAO



OFFICE OF HUMAN RESOURCES

Isiah Leggett
County Executive

Joseph Adler
Director

MEMORANDUM

November 13, 2007

TO: Duchy Trachtenberg, Chair, Management and Fiscal Police Committee

FROM: Joseph Adler, Director, Office of Human Resources 

SUBJECT: Montgomery County's Telework Program

I am pleased to update the MFP committee on the County's implementation of Telework. Progress has been slow with the transition of administrations; we made little progress over the past year. However, County Executive Leggett is committed to telework and sees this as one of several integral components to meeting the objectives of "Keeping Montgomery Moving". The Office of Human is committed and will work with departments in the identification of positions and changing organizational cultural.

As mentioned in our previous report; an interdepartmental Telework team assisted in developing policies, procedures and materials; we will continue the use these materials in promoting telework:

- Interim Telework Program Policy
- Work Agreement and Disclosure of Binding Terms
- Selecting Position Eligible for Telework
- 10 Steps to Telework
- Telework Suitability Self Assessment for employees and supervisors
- Workspace self-certification Checklist and Safety Guidelines

We are committed to the success of Telework in Montgomery County and will work with senior management to accomplish our goal.

MEMORANDUM

March 27, 2008

TO: Management and Fiscal Policy Committee

FROM: Susan D. John, Legislative Analyst *SDJ*

SUBJECT: Update -- Interagency Telework Initiative

Today the Committee will receive an update from County agencies on the status of efforts toward the Interagency Telework Initiative. The following individuals are expected to brief the Committee and participate in the discussion:

- Karen Plucinski, Office of Human Resources (OHR), County Government
- Ginger Corpuz, Montgomery County Public Schools (MCPS)
- Patrick Mattingly, Housing Opportunities Commission (HOC)
- Yvonne McKinney, Washington Suburban Sanitary Commission (WSSC)

BACKGROUND

On September 14, 2004 the County Council adopted a resolution supporting the Interagency Telework Initiative and calling for an interagency operational telework plan as well as regular progress updates (©1-2). This resolution also references the Council's endorsement of the Metropolitan Washington Council of Government (COG) goal of having 20 percent of eligible employees participating in telework programs by 2005. The original operational plan that the agencies produced in response is also attached (©3-4). It included common definitions and principles, targets, and measurement information to be used by each agency. It also specified those areas in which agencies would need to create their own distinct approaches and policies. All agencies provided a written update in 2005, and the Committee additionally discussed the County Government's program in March 2006, February 2007, and November 2007.

CURRENT INFORMATION

Attached in the packet are the most recent 2007 written updates from several agencies (©12-36). Not all have responded to requests for information. As soon as updates become

available, they will be provided to the Committee. Participation numbers have not changed significantly for those agencies that provided updates from November 2007 figures.

TRENDS

The number of approved teleworkers has not changed significantly since the last update before the Committee in November 2007. There have been significant changes since data were first reported to the Committee in February 2006. The County Government lost all its teleworkers over the past two years, while MCPS has significantly increased its participation.

Agency	February 2006	November 2007	March 2008	Change From Feb. 2006
MCG	15	0	0	-15
MC	61	71	76	+15
MNCPPC	12	15		
MCPS	10	69	68	+58
HOC	6	4	4	-2
WSSC	0	n/a	0	0

AGENCY UPDATES

County Government: The Office of Human Resources (OHR) has indicated that the Executive Department directors were briefed in January 2008 on the Telework program at a senior management meeting. A tentative plan was developed that would have OHR meet with department managers to discuss telework options for non-represented employees. Teleworking was placed on hold as the County attempts to abolish over 200 positions through a combination of reduction in force (RIF) and a retirement incentive. Teleworking will again be addressed on April 3, 2008, at a meeting of the Human Resources directors of all five County agencies. County Government intends to implement teleworking once the focus on RIF is completed (see ©12).

Housing Opportunities Commission: Currently there are four participants in its telework program. HOC indicates both supervisors and staff view teleworking favorably (see ©13-24).

Maryland-National Capital Park and Planning Commission: M-NCPPC did not respond to a request for updated information. As of November 2007, the Planning Department has about 800 employees, of whom 15 telework at least one day per week.

Montgomery College: Montgomery College did not respond to a request for updated information. As of November 2007, the College’s telework program had grown by 31 percent over the past year, with 71 employees participating in the program.

Montgomery County Public Schools: MCPS reports that its number of teleworkers increased from 13 in FY07 to 68 in FY08. Managers, supervisors, and employees worked

together over the past year to identify positions that would be eligible for teleworking. MCPS should provide its update letter at the meeting (see ©25-36)

Washington Suburban Sanitary Commission: WSSC does not have a teleworking program in place. WSSC indicates it will reexamine flexible work arrangements, of which teleworking is one, in FY09.

DISCUSSION ISSUES

The agencies' participation rates have remained relatively static over the past year. *In order to boost participation, Committee members may wish to consider whether the definition of teleworking should be changed in an attempt to capture employees who have informal teleworking arrangements.* Those who telework fewer than two days per month are not counted in current data.

Agencies may wish to identify employees who may be able to telework certain parts of the year. For example, MCPS has significant seasonal changes in work functions. Does MCPS have any employees who could more easily telework during the summer months? Do other agencies have similar seasonal or functional changes that might facilitate partial-year teleworking? *As part of redefining what constitutes teleworking, Committee members may wish to consider whether agencies should identify seasonal or functional changes that occur during the year and whether some groups of employees may be able to telework during these periods.*

<u>This packet includes the following:</u>	<u>©#</u>
Resolution 15-743, Interagency Telework Initiative	1-2
Interagency Operational Telework Plan, November 2004	3-11
2008 Agency Updates:	
County Government	12
Housing Opportunities Commission	13-24
Montgomery County Public Schools	25-36

Resolution No.: 15-743
Introduced: September 14, 2004
Adopted: September 14, 2004

**COUNTY COUNCIL
FOR MONTGOMERY COUNTY, MARYLAND**

By: Management and Fiscal Policy Committee

SUBJECT: Interagency Telework Initiative

Background

1. In April 2003, the Council adopted Resolution 15-112, officially endorsing the Metropolitan Washington Council of Government's (COG) goal of 20% of eligible employee participation in telework programs by 2005 for Montgomery County. The resolution indicated that the County Council would work with the business community to broaden business participation in telework efforts and requested that each County agency develop a plan to achieve the COG telework goal.
2. The Management and Fiscal Policy Committee has received regular status reports on telework efforts in County Government, Montgomery County Public Schools (MCPS), Maryland-National Capital Park and Planning Commission (M-NCPPC), Montgomery College, Washington Suburban Sanitary Commission (WSSC), and the Housing Opportunities Commission (HOC).
3. At the most recent status report on June 21, 2004, all agencies reported that they are working on telework initiatives. Agencies without existing programs are developing telework policies and identifying eligible positions for telework, and some have piloted or are planning to pilot telework programs. Agencies with existing programs are updating them and considering ways to expand them. The County Government's Office of Human Resources reported that agency Human Resources directors view telework as a priority and have expressed interest in an Interagency Telework Initiative.
4. The Management and Fiscal Policy Committee supports an Interagency Telework Initiative. Recognizing that each agency may have some unique needs, the Committee recommends that the Initiative include, to the extent possible, uniform telework policies.
5. The Committee supports general telework goals of increasing productivity, decreasing traffic congestion, and making it easier for employees to balance work and family. The Committee recommends that the Initiative include uniform data collection and reporting requirements to track progress in meeting these general goals, and to provide basic information about telework participation in each agency.

Action

The County Council for Montgomery County, Maryland approves the following resolution:

1. The Council requests that the Human Resources directors of County Government, MCPS, M-NCPPC, Montgomery College, WSSC, and HOC develop an interagency operational plan for telework implementation and maintenance.
2. The plan should cover the topic areas in the attached draft proposal; include a timeframe for implementation steps; review the status of each agency's telework efforts to date; to the extent possible, include uniform telework policies; and specify uniform data collection and reporting requirements to track progress in meeting general telework goals and to provide basic information about telework participation in each agency.
3. Using the attached draft as a guide, the Human Resources directors should complete an outline for the plan by December 1, 2004, including target dates to circulate a first draft, review and comment on the draft, and complete a final plan.
4. For calendar year 2005, each agency should provide semi-annual reports on its telework efforts to the Council, including data about telework participants, the impact of telework on commuting, productivity, and work/life balance, and the status of agency participation in the Interagency Telework Initiative. After 2005, each agency should provide an annual report including the same categories of information.

This is a correct copy of Council action.



Mary A. Edgar, OMC
Clerk of the Council

GOVT



MD
CR
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LL

OFFICE OF HUMAN RESOURCES

Douglas M. Duncan
County Executive

Joseph Adler
Director

MEMORANDUM

November 30, 2004

TO: Marilyn Praisner, Chair, Management and Fiscal Policy Committee
Howard Denis, Lead Councilmember for Personnel Issues

FROM: Joseph Adler, Director
Office of Human Resources

SUBJECT: Interagency Telework Initiative



012332

On behalf of the Interagency HR Directors, enclosed is an Interagency Operational Telework Plan that includes uniform telework policies, data collection, and reporting requirements to track progress. Under separate cover, each Agency will submit information about their telework initiative and participation.

To ensure successful administration of the Interagency Telework Program, we have established a cross-functional implementation team that will meet on a regular basis to assess progress and share ideas. We also share your interest in encouraging County agencies to implement or expand participation in telework programs but may find the Metropolitan Washington Council of Government's goal of 20 percent of eligible employee participation a challenge to meet by 2005 based on agency priorities and staffing levels.

In addition to the Interagency Operational Telework Plan, enclosed is Montgomery County's implementation and phase in plan for Telework. If you have any questions or would like additional information, please let me know.

JA/kp
Attachment 2

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73

INTERAGENCY TELEWORK PROGRAM FOR COUNTY AGENCIES OF MONTGOMERY COUNTY, MARYLAND

Overview

The Interagency Telework Program for County Agencies is an initiative by County Human Resources directors to establish an operational plan for telework implementation and maintenance. Agencies participating in the Program include the Montgomery County Government, Montgomery County Public Schools (MCPS), the Maryland National Capital Park and Planning Commission (M-NCPPC), Montgomery College, the Washington Suburban Sanitary Commission (WSSC), and the Housing Opportunities Commission (HOC).

Under the auspices of the Interagency Telework Program, County Agencies shall engage in a collaborative effort to meet the goals of the County Council for Montgomery County, Maryland to allow 20% of eligible agency employee's to participate in a telework program by the year 2005, as established by the Metropolitan Washington Council of Government's (COG). *A significant number of positions will not be eligible to participate in a sponsored Telework program due to the nature of the job (i.e. teachers, bus operators, public safety, maintenance, services & trade, highway service personnel and employees who provide direct service to customers).*

Organizational Structure for Implementation and Ongoing Administration

To ensure successful administration of the Interagency Telework Program, agency representatives shall establish a cross-functional implementation team that will meet on a regular basis to assess the progress of each agency telework program.

Background

An Interagency Telework team has met a total of six times since October 22, 2004 to identify uniform telework policies, data collection and reporting requirements to track progress and develop an interagency operational plan for telework.

Program Guidelines

The following Interagency Operational Telework Plan will serve as a guideline for County Agencies to administer and measure the success of their telework programs. Working within the confines of the Interagency Operational Telework Plan, County Agencies shall have the authority to administer their telework programs, policies, and procedures in accordance with their unique organizational needs. Accordingly, employees who participate in an Interagency Telework Program will be subject to the policies and procedures of their Agency's individual telework program.

Interagency Operational Telework Plan

Template

Definition:	<p>Telework: Under the Interagency Operational Telework Plan, County Agencies define Telework as working at home or at another work site instead of traveling to an agency office. Telework is a work alternative available to eligible employees when it would benefit both the agency and the employee.</p> <p>Alternate workplace: A work site other than the employee's traditional office setting; which could include the employee's residence, telework center, or satellite office.</p> <p>Eligible Employees: Employees eligible to telework must be in a job identified by the employee's supervisor and senior management as being suitable for telework. Eligible employees must also have demonstrated evidence of satisfactory work performance.</p> <p>Teleworker: Under the Interagency Plan, a teleworker is a person who, for at least two days or more per month, works at home or at an approved offsite location to produce an agreed upon work product.</p>
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Program Goals and Objectives	<p>Teleworking is a Community friendly program, which provides an alternate work arrangement for employees while supporting the mission of the Agency.</p> <p>Telework supports national and regional environmental efforts to improve air quality through a decrease in the number of vehicle cold starts and a corresponding reduction in traffic and mileage by teleworkers who would otherwise commute.</p> <p>By providing flexible work arrangements such as telework, County Agency's afford employees opportunities to enrich their lives by gaining quality time otherwise lost as a result of lengthy commutes.</p> <p>In addition to enabling employees to balance work and family obligations and by assisting in the community effort to reduce outdoor air pollution attributable to automobile travel, telework may ultimately help to retain excellent employees, provide a way to conserve scarce office space, and lend support during emergency contingency plans.</p>
-------------------------------------	--

**Program
Policies /
Guidelines**

Employees who participate in an Interagency Telework Program are subject to all County Agency policies and procedures including, but not limited to those regarding confidentiality; disclosure of information; conflict of interest; and acceptable use of information technology resources.

Telework is not a formal, universal employee benefit but an alternative method of meeting the needs of a County Agency. Since *telework is a privilege*, agencies have the right to refuse to make telework available to an employee and to terminate a telework arrangement with adequate notice to the employee.

Employees may be restricted or limited if participating in other alternate work schedules.

Employees participating in an Interagency Program will "telework" *two or more days per month, up to the maximum allowed per Agency*, and report to the office for work the other days.

Each County Agency will *identify and determine which positions are eligible* to participate in Telework based on job requirements and the needs of the department within each County Agency. While an employee's position may be eligible for Telework, a determination of whether the employee meets the employee eligibility criteria, the work space requirements, and the skills required for successful teleworking must also be evaluated.

Employees in eligible positions who wish to participate in the Telework Program will be required to complete a Telework Application. The application will be reviewed and approved by the employee's immediate supervisor and senior management as defined by each County Agency.

Salary, benefits, and job responsibilities do not change as a result of teleworking. Employees will work their approved work schedule.

Telework employees agree to perform only official duties and not to conduct personal business while on work status in the home office. Personal business includes, but is not limited to, caring for dependents or making home repairs, etc.

Each Agency will have its own Telework application, agreement, and procedures that meet the business needs of that particular agency for the purpose of employees Teleworking.

<p>Position Eligibility</p>	<p>Telework is a cooperative arrangement between the County Agency and the employee. The arrangement is <i>voluntary</i> and its approval is based on a review of the departmental work program, the employee's job duties and performance level, as well as the proposed alternate work site.</p> <p>The County Agency identifies eligible positions based on the:</p> <ul style="list-style-type: none"> ▪ essential functions of the position and its ability to perform off-site with only e-mail and phone support; ▪ work performance for the position can be measured in a telework arrangement; ▪ proprietary information of the County Agency can remain confidential; and ▪ ability to maintain or improve service delivery to internal and external customers. <p>Participation in telework opportunities will vary among departments, offices, and units, depending upon the needs of the particular area and the function and responsibilities of the position.</p>
<p>Employee Eligibility</p>	<p>Employees must have demonstrated evidence of satisfactory work performance.</p> <p>Employees must have proven competencies in critical areas to perform successfully in a telework environment, including the ability to work independently and plan and carry out assignments with little assistance or direction from others. It is the responsibility of the supervisor to assess whether the employee has developed these skills within the scope of his/her position. Candidates must have:</p> <ul style="list-style-type: none"> • Strong time management skills • Strong communication skills • Ability to prioritize • Proficiency with technology

<p>Safety of Off-Site Work Space</p>	<p>Employees participating in the telework program must designate a specific work space for use for telework. The designated work space must be maintained by the employee in a clean, professional, and safe condition.</p> <p>The employee's off-site work space will be considered an extension of the Agency's work space. The Agency reserves the right to inspect the work space upon 24 hours notice. Workers' Compensation liability is limited to the designated work space as opposed to all areas of the home.</p> <p>In the event of an injury at the off-site location, the employee shall immediately (as circumstances permit) contact his/her supervisor.</p>
<p>Equipment</p>	<p>Employees participating in the telework program may be responsible for the cost, purchase and maintenance of office equipment and supplies necessary to properly furnish the work space used for telework to include utilities, telephone, internet connections, and related costs at the off-site location.</p> <p>The purchase of equipment solely for the purpose of permitting an employee to function in a teleworking environment will be determined by each County Agency depending upon resources and business needs.</p> <p>Consumable office supplies typically used by the employee in the course of business at a County Agency will be provided with the prior, written approval of their immediate supervisor.</p>
<p>Program Support (IT; Training and Performance Evaluation)</p>	<p>Each Agency will identify technology required to support telework and address identified needs of eligible employees of that particular agency.</p> <p>Each Agency will identify training required to support telework and address identified needs of eligible employees and their supervisors. If applicable, Agencies will partner to pool resources.</p> <p>Teleworkers will be held to the same performance evaluation standards as other employees within each Agency.</p>

**Telework
Schedule,
Hours and
Availability**

A regular telework schedule must be established and approved by the immediate supervisor prior to beginning a telework schedule. The amount of time the employee is expected to work per day or per pay period will not change due to participation in the telework program.

A telework schedule may include one, two or more days per month (up to the maximum days allowed by each agency) of work at home or at an alternate work site. Longer telework schedules may be approved for a limited period on an exception basis. Employees shall not perform personal business or activities during designated work hours.

Employees who have a telework schedule may cease teleworking by notifying their supervisor in advance of terminating the work arrangement. Supervisors may terminate the telework arrangement with adequate notice to the employee.

Employees who telework must be available by telephone and/or e-mail during scheduled work hours.

Participants in the telework program are required to have a telephone. Employees may be required to check voice mail and e-mail messages on a regular basis.

The supervisor retains the right to require an employee who teleworks to commute to the office on a regularly scheduled telework day should the work situation warrant such an action. This situation is expected to be only an occasional occurrence. If the employee is frequently required to return to the office during a regularly scheduled telework day, the supervisor may re-evaluate the compatibility of the employee's position and job responsibilities with teleworking.

Employees participating in the telework program will continue to follow the Agency's times and attendance standards and adhere to their approved work schedule, including work hours, while teleworking.

If a telework employee is unable to work when scheduled to work off-site, the employee will notify the supervisor and report hours worked and use of applicable leave for hours not worked.

Telework employees must obtain advanced supervisory approval before performing work in excess of their regular work schedule. Any overtime work must be pre-approved by the appropriate supervisor.

Employees who telework are required to submit bi-weekly time sheets in accordance with the normal schedule.

**Program
Evaluation and
Outcome
Measures**

To ensure consistency in evaluating Agency telework programs and reporting on the impact telework has on commuting, productivity, and work/life balance, County Agency's shall collect the following information annually from each teleworker, using a uniform questionnaire:

- Name, title, department, etc.
- Worksite location(s) on non-telework days
- Number of miles between employee's home and the worksite (one way)
- Means of transportation on non-telework days (drive alone, carpool/vanpool, transit - bus or rail, bike/walk)
- Usual commute routes on non-telework days (as applicable to the top ten commuter routes in the Washington D.C. Metropolitan area)
- Type of telework site (home, telework center, satellite office, other)
- Address of telework site
- Number of days employee is scheduled to telework per month
- Number of miles from employee's home to the telework site (one way)

Based on the information collected above, each County Agency shall report the following information to the Management and Fiscal Policy Committee on an ongoing basis:

- Number of employees in positions eligible to telework
- Number of active teleworkers
- The average number of days employees are scheduled to telework per month
- Total number of days employees teleworked overall
- Average number of miles traveled between teleworker's homes and worksites (one way) on non-telework days
- Means of transportation on non-telework days
- Top ten commuter routes typically traveled by teleworkers on non-telework days (as applicable to the Washington D.C. Metropolitan area)

The Interagency Telework Team will develop and administer a standardized survey to be completed by teleworkers and supervisors of teleworkers every other year to collect and report on the following information:

- Performance and productivity impacts
- Planning and scheduling impacts
- Communication and work team impacts
- Impact on balancing work/life issues
- Impact on job satisfaction
- Changes in telework status and reasons prompting those changes

Montgomery County Telework Implementation and Phase in

December 2004	For the purposes of this program, the scope of employees includes full-time and part-time unrepresented in the executive and legislative branch of County government.
January - February 2005	<p>Create an interdepartmental Telework team to:</p> <ul style="list-style-type: none"> ▪ review policies, procedures and communication ▪ assist and guide managers in the identification of positions ▪ define IT support ▪ refine Informational Packets for Teleworkers and supervisors
March 2005	Promote and enlist departmental support for teleworking.
March - April 2005	Partner with interested departments in the identification of suitable positions.
March - April 2005	Department Directors or designee will identify and determine which positions are eligible to participate based on job requirements and the needs of the organization.
May - June 2005	Develop an "Orientation to Teleworking" for employees and supervisors.
July 2005	Teleworker enter an agreement



OFFICE OF HUMAN RESOURCES

Isiah Leggett
County Executive

Joseph Adler
Director

MEMORANDUM

March 25, 2008

TO: Duchy Trachtenberg, Chair
Management and Fiscal Police Committee

FROM: Joseph Adler, Director
Office of Human Resources 

SUBJECT: Montgomery County's Telework Program

Executive department directors were briefed in January 2008 on the Telework program at a Senior Management meeting. The County Executive reiterated his support for Telework and other alternative work schedules. A tentative plan was developed whereby OHR would meet with County department managers to discuss the options available to them for non-represented employees to move forward with this initiative.

Unfortunately the County's budget and revenue crisis has intervened, causing this initiative to be placed on hold. As you are aware, the County intends to abolish over 200 positions through a combination of Reductions in Force (RIF) and a retirement incentive. Both OHR and other Executive departments have been focusing on developing procedures to make this contraction of County government as painless as possible under the circumstances, thus making it difficult to discuss alternative work schedules.

A meeting of the Human Resources directors of all five County agencies is scheduled for April 3, 2008. At that session, the issue of Telework and alternative work schedules is on the agenda for possible roll out in FY09. In previous meetings of this group, all agencies expressed support for the concept, but each wanted to fashion their program to suit their unique needs. It is our desire to revive and implement this initiative once the focus on RIF is completed.

Please contact me at 240-777-5100, or 5010, if you wish to discuss further.
Thank you for your patience and understanding.



10400 Detrick Avenue
Kensington, Maryland 20895-2484
(240) 773-9000

March 24, 2008

The Honorable Duchy Trachtenberg, Chair
Management and Fiscal Policy Committee
Stella B. Werner Council Office Building
100 Maryland Avenue
Rockville, MD 20850

Dear Ms. Trachtenberg:

Thank you for your continued interest in the Housing Opportunities Commission Telework Program.

As reported to the MFP Committee in HOC's last Telework Update in November 2007, HOC completed its Telework Pilot Program June 30, 2006. Effective July 1, 2007, HOC established Telework as a standard work schedule alternative for employees in eligible positions.

Since the November 2007 Telework Update, HOC has reassessed all agency positions for telework eligibility. With three years of agency experience managing the "telework" employee, the reservations of supervisors and division directors on having staff telework has waned. The completed reassessment increased the number of job classifications eligible for telework from 13 to 17 and the number of eligible positions from 28 to 34. In addition, three newly established job classifications will be studied over the next six months to determine whether or not the work of these positions may be performed through telework.

As a point of reference, HOC has a total active complement of 351 employees. Many of the positions provide direct service to residents of Montgomery County on a daily basis and for that reason are not eligible for telework. Due to the responsibility of managing employees, supervisors are not eligible to telework.

Since one of the fundamental objectives of telework is to reduce traffic, it should be noted that HOC has approximately ninety employees working on a



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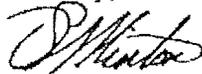
Compressed Work Schedule. These employees fulfill their work schedule by reporting to work nine days over a two week period, instead of ten. This arrangement also eliminates their commute from the county roadways.

HOC will be revising the home computer requirements for HOC staff in the near future. To eliminate the possibility of viruses being uploaded from a personal home PC to the HOC network, HOC currently issues telework employees lap top computers for use at home and in the office. The laptops are to be used for HOC business only and are equipped with appropriate virus defense software to protect the network. In addition, since HOC laptops are configured by HOC, it helps eliminate the potential problems with communications and transmissions for personal home computers which may not have as compatible software.

Looking forward, HOC is converting its Network to a Citrix environment. The Citrix environment will no longer require telework employees to utilize HOC provided equipment. Through Citrix, users use a web interface to log into the network and virtually use their personal computer only as a tool to communicate information (key strokes) and visualize their actions through the monitor. Simply put, Citrix allows users to run applications at work from anywhere in the world. Users have real time access to run applications as fast as if they were in the office. The need for local PC virus protection is eliminated because the user does not run applications on their pc but runs applications live on the HOC network. This change reduces the agency expense of providing laptops or other PC related equipment for telework employees and increases transmission speed and security from the network to the home office.

HOC remains committed to studying Telework and will continue to be an active participant in the Telework Initiative Program.

Sincerely,



D. Scott Minton
Executive Director

HOC Telework Statistics:

	FY2005	FY2006	FY2007	FY2008
Number of Telework Participants	3	5	6	4
Average Commute Time (one-way)	55 mins.	55 mins.	44 mins.	52.5 mins
Average Commute Distance (one-way)	13.7 miles	22.8 miles	20.6 miles	28 miles

Housing Opportunities Commission

Telework Program



July 1, 2006

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Housing Opportunities Commission

Telework Program

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I. Purpose and Scope

The Housing Opportunities Commission recognizes that employees often struggle to balance work and personal life obligations in order to meet all of their responsibilities. Family friendly policies, such as telecommuting or "telework", can provide alternate work arrangements for employees which enable them to meet these responsibilities. Telework also provides benefits to the Agency in enhanced recruiting and retention of employees as well as improvement in productivity and service delivery.

The Executive Director has authorized a Telework Program. The goal of all telework arrangements is to maintain or increase individual employee performance and to provide equal or better service to the clients and customers of the Agency.

In addition to the benefits for the Agency, telework provides a means for employees to maximize their contribution to their family as well as the Agency through less commute time. Telework supports national and regional environmental efforts to improve air quality through a decrease in the number of vehicle cold starts and a corresponding reduction in traffic and mileage by teleworkers who would otherwise commute.

The Executive Director has designated positions within the Agency that meet the fundamental standards for teleworking. Employees in these positions are eligible to participate in the Telework Program.

Participants in the Telework Program "telework" one day each week and report to the office for work the other four days. Telework Program participants are not eligible to work a Compressed Work Schedule.

While an employee's position may have been selected for the Program, a determination of whether the employee meets the employee eligibility criteria, the work space requirements, and the skills required for successful teleworking must also be evaluated.

Employees in selected positions who wish to participate in the Telework Program must submit a completed Telework Application. The application will be reviewed by the employee's supervisor and the division director. All telework arrangements must be approved by the Executive Director.

Employees approved by the Executive Director for participation in the Telework Program will complete a Telework Agreement. Telework participants and their immediate supervisors are required to attend a training session on Telework provided by the Human Resources Office. The Information Technology Division also provides training on computer related issues prior to the employee beginning the telework schedule. Training must be completed prior to a telework arrangement being implemented.

All Telework employees will be rated consistent with the performance expectations outlined in their Performance Plan and Review document. Telework is intended to be a transparent arrangement. Teleworkers and supervisors should maintain constant awareness of its effect on position responsibilities and proactively adapt to minimize any regular affect on the work.

In an effort to have a comprehensive evaluation of the program, all participants selected for the program will be requested to complete a Telework Assessment each year. The Telework Assessment serves as a resource for HOC to gather information on the telework program. It also provides a review point for the employee, supervisor and division to assess the success of the telework arrangement. The Telework Assessment also serves as the renewal application for telework.

All telework arrangements are approved for a one year period. Telework participation may end due to any of the following conditions:

- The employee no longer meets the qualifications for the Telework Program, or
- The employee's supervisor requests to end the employee's telework arrangement because it has affected the employee's performance negatively or the department's service level declines as a result of the employee's participation in the Telework Program, or
- A telework participant requests to discontinue their participation in the Telework Program.

To properly document and evaluate all reasons for discontinuation from the Telework Program, completion of a Telework Discontinuation Form is required.

The final determination as to whether an employee or position is eligible to participate or continue in the Telework Program shall be the responsibility of the Executive Director and shall not be subject to grievance.

II. Telework

Telework is the employee's performance of duties and responsibilities of their position from a "home office" setting. It is important that the chosen location be conducive to the work to be performed and free from unnecessary distractions. HOC provides standards for the telework location in the section on "Work Space".

Not all positions and not all employees are good candidates for telework. Some positions require direct face to face contact with clients or direct service that can only be done in person or at a specific work location. In some cases, a position's duties and responsibilities may be restructured so that duties and assignments that can be performed through a telework arrangement are done in that manner and duties not suited to telework are performed in the traditional work setting.

It is also important to recognize that the telework location is not intended to duplicate the flexibility of the traditional work setting. Under no circumstances are work related meetings to be conducted at an employee's home.

The key to a successful telework arrangement is individual proficiency with the tools and equipment that enable the employee to be productive while teleworking including the ability to manage and prioritize the work requirements independently.

To request telework an employee must complete a Telework Application and forward it to their supervisor. The Telework Application will guide employees and supervisors through a review of the essential components of a position, the competencies of the employee, and equipment and space necessary for a successful telework arrangement.

Telework employees agree to perform only official duties and not to conduct personal business while on work status in the home office. Personal business includes, but is not limited to, caring for dependents or making home repairs, etc.

III. Eligible Positions

For the purposes of the Telework Program, the Housing Opportunities Commission has developed the standards listed below for the determination of position eligibility.

- Are the essential functions of the position able to be performed off-site with only e-mail and phone support.
- Can work performance for the position be measurable in a telework arrangement.
- Does the position work independently and plan and carry out assignments with little assistance or direction from others.
- Can confidentiality of proprietary information of the Housing Opportunities Commission be maintained.
- Can service delivery to the clients and customers of the position, internally and externally, be maintained or improved.
- Can service delivery to the clients and customers of the department to which the position is assigned be maintained or improved.

Supervisory staff is not eligible for participation in the Telework Program. The following positions have been approved by the Executive Director for the Telework Program (*Updated March 2008*):

Division	Positions
Executive	Internal Auditor Human Resources Specialist Human Resources Coordinator Programmer/Analyst – Information Technology Sr. Programmer/Analyst – Information Technology Special Assistant to the Commission Webmaster – Information Technology
Finance	Accountant I Accountant II Assistant Budget Officer
Housing Management:	Asset Manager
Housing Resources	Financial Analyst Management Analyst
Real Estate Development	Sr. Financial Analyst Housing Acquisition Manager
Resident Services	Management Analyst I Management Analyst II

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Employees in the above positions may request to participate in the Telework Program by completing a Telework Application. The Application allows the employee to respond to several questions concerning the duties and responsibilities of their position. The questionnaire is designed to assist the employee, supervisor and division director in studying the essential functions of the job in order to determine how the duties and responsibilities of the employee's position can be performed through a telework arrangement and to address any service concerns.

Restructuring of the position's duties and responsibilities *within* the position to develop a workload that can be accomplished through telework is allowable provided it does not negatively impact upon service delivery or performance. However, a position's duties and responsibilities may not be altered. For example, removing a task from a telework candidate and assigning it to another employee in order to meet the standards for the Pilot is not acceptable.

The Telework Application serves as a valuable tool in the Executive Director's final selection of an employees participation in the Telework Program.

IV. Eligible Employees

In addition to the duties and responsibilities of the position, employees must meet the following conditions and standards to be eligible for the Telework Program:

- The employee must be a Career or Term Employee and have a current Performance Rating of "Fully Successful" or above in their assigned position.
- The employee must not currently be on probation for performance or disciplinary reasons.
- The employee must not be involved in disciplinary process, including Sick Leave Restriction.

Also, employees must have proven competencies in critical areas to perform successfully in a telework environment. It is the responsibility of the supervisor to assess whether the employee has developed these skills within the scope of their position to be a successful telework candidate:

- Strong time management skills
- Strong communication skills

- Ability to prioritize
- Proficiency with technology
- Meet the Work Space Requirements

V. Computer Requirements

Employees participating in the HOC Telework Program will be issued HOC owned laptops (replacing their HOC desktops). The laptops will have all software and hardware required by telework employees to connect to the HOC network.

Telework employees must be able to troubleshoot routine problems independently or with only phone assistance from the Information Technology division. The Information Technology division will not send technicians to the off-site location to perform service.

In addition, the Information Technology Office strongly recommends that the computer have broadband access. Communicating with HOC's network through a modem is highly inefficient and will result in slow transmission of response and data files. Teleworking through a modem is discouraged.

Candidates selected for the Telework Program will be required to attend a class provided by the Information Technology Office to familiarize themselves with configuration and troubleshooting standard telework problems.

VI. Work Space

Employees participating in the Telework Program must designate a specific work space for use for telework. The designated work space must be maintained by the employee in a clean, professional, and safe condition. To assure that these conditions are met, the following standards apply:

- Entryways to the work space must be clear of obstructions at all times.
- The office space must be neat, clean, and free of obstructions.
- The work space must be free of potential hazards that could cause physical harm such as frayed wires, bare conductors, loose wires, exposed wires to the ceiling, frayed or torn carpeting seams; uneven floor surfaces, etc.
- Electrical outlets must be properly grounded and three pronged. Surge protectors may serve this purpose.
- Phone lines, electrical cords, and extension wires must be properly secured behind furniture to ensure no danger of entanglement.
- Lighting must be sufficient for reading and writing.

HOC retains the right to inspect the work space upon twenty-four hours notice for the purpose of determining that the work space meets the standards set forth above and is safe and free from hazards.

The employee's off-site work space is also considered an extension of the Agency's work space. Therefore, the Agency maintains liability for job-related accidents that occur in the off-site work space during the employee's working hours. Please note that Workers Compensation liability is limited to the designated work space as opposed to all areas of the home. HOC assumes no responsibility for the employee's personal property. Work related meetings are not to be conducted at an employee's home under any circumstances.

In accordance with HOC's Incident/Accident procedures, accidents occurring at the telework location must immediately be reported to the Human Resources Office and the employee's direct supervisor. The employee is also required to complete an Incident/Accident Report and forward the completed form to their supervisor within one business day, their division director and Chief of Staff within 24 hours of the incident. Any accidents occurring in a telework location will include an inspection of the work site.

VII. Office Equipment

Employees participating in the Telework Program will be responsible for the cost, purchase and maintenance of additional office equipment and supplies necessary to properly furnish the work space used for telework. Consumable office supplies typically used by the employee in the course of business at HOC will be provided by HOC. If in doubt, the employee is advised to discuss their needs with their supervisor.

HOC will provide standard consumable office supplies. However, supplies will not to be delivered to the telework location by HOC. It is the responsibility of the employee to pick up the supplies at HOC offices and transport them to the telework location.

VIII. Work Schedule/Time and Attendance

The employee and supervisor must agree on which day of the week day the employee will telework. Telework arrangements must be structured around circumstances which require the physical presence of the employee in the traditional work setting. For example, critical processes that can only be performed at the traditional work location, or standing meetings in which the employee's physical presence is required.

Consideration should also be given to the work flow of the employee's position, and the work flow of the department to which the employee is assigned to ensure that performance or service will not be negatively affected.

Participants in the Telework Program must adhere to the Telework Work Schedule that is approved. In addition, the supervisor may require the employee to report to the traditional work setting on planned telework days as needed.

Employees in the Telework Program continue to follow the Agency's Times and Attendance standards and adhere to their approved Work Schedule, including work hours, while teleworking. Telework employees must obtain advance supervisory approval before performing work in excess of their regular work schedule. As always, Overtime and accrual of Compensatory Time Leave must be approved by the employee's supervisor in advance. Working overtime without such approval may result in termination from the Telework Program and/or other appropriate action. Requests for leave use must also be approved in advance.

Participants in the Telework Program have a designated day each week in which they telework and are expected to adhere to the Telework Schedule approved.

With prior supervisory approval, employees may change the day during a specific week in which they telework. Employees may also telework on additional days during a specific week with prior approval of the Division Director. All instances in which an employee teleworks more than two days in a given week must be reported to the Chief of Staff.

IX. Customer Service, Performance & Telework

All HOC employees are required to maintain the Customer Service standards for the Housing Opportunities Commission. When an application for Telework is submitted, it is important that Telework participants and their supervisors discuss the effect of telework on customer service.

Telework employees and their supervisors must develop standard procedures to assure no loss in service delivery as a result of telework. In addition to the external customer, telework creates a new dynamic in providing customer service to other HOC employees.

Employees participating in the Telework Program are expected to provide the same level of service as would be provided as though they were in the office, including reviewing and responding to e-mail and phone messages. Supervisors and telework applicants should also consider the manner of communication between each other while the employee is teleworking.

Office of Human Resources
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

August 29, 2007

MEMORANDUM

To: Mr. Larry A. Bowers, Chief Operating Officer
From: Susan F. Marks, Associate Superintendent
Subject: Recommended Telework Positions and Employees for FY 2008

The purpose of this memorandum is to submit telework position and employee recommendations for your review and approval, and to provide information about the current state of the telework program. This year, 68 applicants are being recommended for approval, 9 of whom teleworked during FY 2007. The number of applicants is a significant increase over the 13 employees who telecommuted last year.

The following positions are included in this recommendation:

- Assistant for Assessment and Data Collection (0746)
- Consulting Teacher (1008)
- Consulting Principal (0555)
- Data Management Coordinator (6775)
- Fiscal Assistant II (5030)
- Fiscal Assistant V (4850)
- IT Systems Engineer (5270)
- IT Systems Specialist (5160)
- Psychologist (0933)
- Pupil Personnel Worker (0931)
- Professional Growth Consultant (5175)

Once positions are approved, we will send an application and Teleworker Agreement to the employee's supervisor to complete and return to my office. Employees approved to telework and their supervisors will participate in telework training conducted by Hia Kim, supervisor, directory services team and Ginger Corpuz, assistant to the associate superintendent, Office of Human Resources on one of the following dates:

Date	Lab	Time
September 25, 2007	1 CTI	12:30 p.m. – 3:30 p.m.
September 27, 2007	4 CTI	9:00 a.m. – 12:00 p.m.
October TBD	TBD	TBD

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The outcomes for the training include a review of telework and IT information and expectations which is outlined on the attached draft agenda.

If you have any questions, please contact Ms. Ginger Corpuz, assistant to the associate superintendent, Office of Human Resources at 301-279-3900.

SFM:ces

Attachments

Copy to:

Ms. Corpuz

Ms. Kim

Approved: _____

Larry A. Bowers, Chief Operating Officer

(2/0) (96)

REGULATION MONTGOMERY COUNTY PUBLIC SCHOOLS

Related Entries: EDC-RA, GAA, IGS, IGT-RA
Responsible Office: Human Resources

Teleworking

I. PURPOSE

Montgomery County Public Schools (MCPS) supports teleworking as an effective way to improve employee productivity, reduce the amount of time employees spend commuting to and from work, ease traffic congestion, reduce the environmental impact of car emissions, and promote a balance between home and work.

II. BACKGROUND

As technological capabilities have increased, the possibilities for working from remote locations have increased. Teleworking can increase employee productivity when there is a beneficial match between the needs of MCPS and the employee. Teleworking has the possibility to contribute to a more effective workforce when a balance between home and work is promoted.

III. DEFINITIONS

- A. *Teleworking, or telecommuting*, is the practice of working from a remote work place, such as home or an approved alternate location, instead of commuting to a designated office.
- B. *Designated office* is the employee's usual and customary MCPS work address.
- C. *An approved telework position* is an existing position class that has been approved for teleworking by the chief operating officer. The duties and responsibilities of eligible positions shall be suitable for telework. Individual telework schedules must fit the needs of managers and employees.
- D. *Teleworking schedule* is a flexible deployment of staff to meet MCPS and employee needs. Telework may occur on either a regular schedule (one or more days each week) or episodic schedule (occurring intermittently each month). Teleworking may be less than full-time, supplemented by working at the designated office.

- E. *Telework locations* include the following examples:
1. *Homebased* is identified as an area in an employee's residence used for work during teleworking hours.
 2. *Approved alternate location* is identified as working in a location approved by MCPS that is not the employee's designated office or residence.

III. PROCEDURES

A. Identification of Approved Telework Positions

1. Each June, the superintendent or his/her designee, deputy superintendents, chief school performance officer, associate and community superintendents, and department directors submit to the associate superintendent, Office of Human Resources, positions proposed for telework. The list of proposed positions shall include the following:
 - a. Current approved telework positions that are recommended for continued approval for telework
 - b. Additional positions that are recommended for approval for telework
 - c. Current approved telework positions that are not recommended for continued approval for telework
2. Each written request must include the current position classification, title, the name(s) of incumbents, the name of immediate supervisor, and work location(s), and signatures of the immediate supervisor, appropriate director/associate superintendent, and appropriate deputy superintendent or chief operating officer.
3. The associate superintendent, Office of Human Resources, consolidates the requests and submits recommendations to the chief operating officer for approval. The associate superintendent, Office of Human Resources, notifies those submitting requests of the decision.

B. Identification of Employees for Telework

Managers, supervisors, and employees will work together to evaluate individual jobs and individual employees based on all of the following factors:

1. The employee's desire to telework
2. The employee's history of work performance
3. The employee's demonstration of an ability to work effectively and independently
4. The nature of the work performed and the work products required
5. The tools necessary to perform the work
6. Scheduling issues
7. The off-site job location
8. Ability to manage work hours and employee expenses
9. The employee is currently in a position approved for telework

C. Teleworking Compensation, Job Classification, and Employee Duties and Responsibilities

All applicable federal, state, and local laws, and MCPS policies apply to teleworkers.

D. Telework Agreements

1. Teleworking at MCPS is a management option, not an employee right. It is a voluntary option extended to employees with the clear understanding that every job and every employee may not be adaptable for remote work. Telework is not an option that an employee can demand or has a right to expect. It is, instead, an option that management uses whenever there is agreement between the employee and the appropriate director/associate superintendent that it is most appropriate for the situation and circumstances.
2. This is a voluntary program both for MCPS and the employee, and the arrangement can be terminated by either party.
3. The associate superintendent, Office of Human Resources, shall send a Telework Application and Telework Agreement form to the supervisor of the approved employee. The employee shall complete the application and Telework Agreement form and obtain the approval and signatures of the immediate supervisor, appropriate director/associate superintendent, and

appropriate deputy superintendent or chief operating officer. The completed Telework Agreement form shall be sent to the associate superintendent, Office of Human Resources.

4. Employees in approved telework positions who are requesting approval to continue teleworking shall complete a new Telework Agreement form each year after being notified that the position has been approved for telework.

E. Training

Teleworkers and their supervisors will participate in specialized telework training, including strategies, expectations, commitment, and logistics.

F. Authorized Expenses

Managers or their designees may authorize expenditures using established procedures and based on available funding for office equipment, software, communication devices, including long distance charges related to MCPS business and office supplies needed by teleworkers at their remote work place.

G. User Responsibilities for Computer Systems and Network Security

MCPS retains ownership of all equipment provided for telework. When MCPS equipment is used at a remote work place, the employee is financially responsible for that equipment if it is lost, stolen, or damaged because of that employee's negligence, misuse, or abuse in accordance with Regulation IGT-RA. The use of any personal equipment by the employee for purposes of telework is done solely at the employee's risk.

Teleworkers must protect information and resources against theft, unauthorized access, tampering, and loss in accordance with Regulation IGT-RA: *User Responsibilities for Computer Systems and Network Security*.

Regulation History: New Regulation August 23, 2006

Montgomery County Public Schools

Teleworker Agreement

This Agreement establishes the respective obligations of the parties under the Montgomery County Public Schools (MCPS) telework program. The employee has volunteered to work as a teleworker at a location other than the designated headquarters, such location being described in this Telework Agreement.

This Agreement is not an employment contract or a guarantee of employment. The unenforceability of any provision of this Agreement shall not affect the remainder of the Agreement.

Both parties will abide by the MCPS policies and regulations and any changes thereto.

Teleworking, or working from a management option that MCPS may choose to make available to some employees when a mutually beneficial situation exists. Teleworking is not an employee benefit. Telework may be approved when there is agreement between the employee, supervisor, and associate superintendent or designee that it is appropriate for the situation and circumstance. Decisions on both the positions and individuals are solely at the discretion of management, based on the factors set forth. The telework arrangement can be terminated by either the employee or MCPS at any time, using the process outlined in the Agreement. Termination of an employee's participation in the telework program is not, by itself, grounds for an administrative complaint or subject to appeal.

Work Location

The terms "remote work location" or "remote workplace" shall mean the employee's home or any field or satellite office location approved by the employee's supervisor. The term "designated headquarters" shall mean the employee's usual and customary MCPS work address.

The site chosen as the employee's remote workplace must be approved by MCPS. A layout of the proposed remote workspace, furniture, equipment, and electrical outlets shall be submitted to MCPS for approval and attached to this Agreement. The employee agrees that MCPS may make on-site visits to the remote workplace during the teleworker's work hours. Any visits shall be made at a mutually agreeable time for the purpose of picking up or delivering work, equipment, materials, evaluating the teleworking arrangement, or checking or maintaining MCPS-owned equipment.

The employee must work at the designated headquarters or other assigned location when not at the remote workplace. The employee's supervisor shall ensure that the employee has an adequate work area when at the designated headquarters.

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Supplies and Equipment

MCPS may, at its sole discretion, choose to purchase equipment and related supplies for use by the employee or may permit the use of employee-owned equipment. Cost of supplies purchased by the employee shall not be reimbursed without prior approval.

The decision as to the type, nature, function, and/or quality of electronic hardware, computer software, data, and telecommunications equipment used shall rest entirely with MCPS. The decision to remove or discontinue use of such equipment, data, and/or software shall rest entirely with MCPS.

The employee shall use only approved communication software when connecting with the MCPS network.

The Agreement states the understanding between MCPS and the employee and applies to teleworkers in general.

Equipment, software, and supplies provided by MCPS for use at the remote workplace shall be limited to use by authorized persons for purposes related to official MCPS business, including self-developmental training and tasks sponsored by MCPS.

Employee agrees that all MCPS-owned data, software, equipment, facilities, and supplies will be properly protected and secured. MCPS-owned data, software, equipment, and supplies shall not be used to create employee-owned software or personal data. MCPS software shall not be duplicated. Products and programs developed while teleworking for MCPS shall become the property of MCPS.

In the event of equipment failure or malfunction, the employee shall immediately notify MCPS so that the equipment may be repaired or replaced, as necessary. In the event of delay in repair or replacement, or any other circumstances under which it would be impossible or impractical for the employee to telework, the employee will be assigned other work and/or assigned to another location, at the sole discretion of MCPS.

In the event that legal action is required to regain possession of property owned by MCPS, the employee shall pay all costs incurred by MCPS, including attorney's fees, should MCPS prevail.

Work Hours and Compensation

The employee's supervisor shall validate the employee's time and work accomplished at the remote workplace.

Schedule changes may be made at the supervisor's discretion. In every case, the operational needs of MCPS shall take precedence over telework.

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Work hours and vacation schedules shall conform to existing policies and procedures and the terms of this Agreement. Before overtime is worked, approval must be obtained from the appropriate primary account manager or director. The employee's salary, retirement, benefits, and state-sponsored insurance plans remain unchanged.

Safety and Liability

The employee and MCPS liability and obligations shall be governed by all applicable federal, state, and local laws and regulations.

MCPS does not assume liability for loss, damage, or wear of employee-owned equipment. The employee is responsible for proper operation of MCPS equipment and shall be liable for any damage or loss caused by the employee's intentional wrongful or negligent act. The employee is not required to insure MCPS-owned property; however, any loss of MCPS property that is paid by the employee's homeowner's policy will be reimbursed to MCPS.

The employee shall designate a workspace within the remote workplace and shall maintain this workspace in a safe condition—free from hazards and other dangers to the employee and equipment.

The employee shall maintain the same environment in the remote workspace as he or she would at the designated headquarters. Employees are subject to the same MCPS policies, regulations, and procedures, regardless of the work location.

Furniture, lighting, environmental protection, and household safety equipment incidental to use of MCPS equipment, software, and supplies shall be appropriate for its intended use and shall be used and maintained in a safe condition, free from defects and hazards.

The employee shall notify the supervisor immediately in case of injury.

Employee Duties and Obligations

The employee shall be held responsible for official documents and shall be subject to disciplinary action for any loss of these documents that is attributable to the employee's actions or negligence.

The employee shall comply with all applicable laws, policies, regulations, and instructions regarding ethics, conflicts of interest, and confidentiality.

The employee shall participate in all before, during, and after telework surveys, legislative inquiries, reports, or analyses relating to telework for MCPS. Inquiries will be governed by the Maryland Open Records Act.

The employee shall comply with all MCPS rules, policies, regulations, procedures, instructions, telework guidelines, and this Agreement. The employee understands that violation of such may

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result in cancellation of this Agreement and/or disciplinary action, up to and including termination of employment.

Assignment

Following are the conditions for teleworking agreed upon by the teleworker and his/her supervisor:

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

2. The employee will telework ____ days per week or as agreed upon with the supervisor.
3. The employee's work hours will be as follows or as agreed upon with the supervisor:

4. The employee agrees to come into the headquarters location for meetings with a minimum of _____ hours advance notice.
5. The following MCPS-owned or employee-owned equipment will be used by the employee at the remote work location(s):

<u>Description</u>	<u>Company #</u>	<u>Serial #</u>
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The employee is financially liable for loss or damage to this equipment if the loss or damage results from the employee's negligence, intentional act, or failure to exercise reasonable care, safeguarding, maintenance, or service of this equipment.

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Termination of Agreement

This Agreement shall remain in effect for one fiscal year or the balance of a fiscal year unless terminated by either party under the terms set forth in this Agreement.

This is a voluntary program. MCPS reserves the right to terminate the Agreement at any time for any individual employee or as a program (with 10 working days notice) if the telework program is canceled or if MCPS needs are no longer being met.

In cases of termination for cause, this Agreement may be terminated without prior notice, according to MCPS policies and regulations.

The employee may terminate this agreement at any time with 10 working days notice.

MCPS will not be held responsible for costs, damages, or losses associated with the termination of this Agreement.

Upon termination of this Agreement by either party, the employee shall return to MCPS all notes, data, reference materials, sketches, drawings, memoranda, reports, records, equipment, supplies, and all other MCPS documents in the employee's possession or control.

I affirm by my signature below that I have read this agreement and understand its subject matter.

Employee Signature

Date

Supervisor Signature

Date

Associate Superintendent Signature

Date

Deputy Superintendent Signature

Date

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Montgomery County Telework Program Program Policy

I. Purpose.

This policy provides implementation guidelines for operation of the Montgomery County Government's Telework Program. The intent of the Program is to promote telework as a legitimate alternative for managers, supervisors and employees, enable departments to remain functional during emergency shutdown; and improve the recruitment and retention of high quality employees through enhancements to employees' quality of life.

II. Background.

Increasing traffic congestion, advances in telecommunications, and changing social needs have increased the need for alternative work arrangements. In 2004 the Interagency Telework Program for County Agencies was established to create an operational plan for telework implementation and maintenance. Through this initiative County Human Resources directors will collaborate in an effort to meet the goal of 20% of eligible agency employees teleworking by the year 2005, as established by the Metropolitan Washington Council of Government's (COG).

Agencies participating in the Program include the Montgomery County Government, Montgomery County Public Schools (MCPS), the Maryland National Capital Park and Planning Commission (M-NCPPC), Montgomery College, the Washington Suburban Sanitary Commission (WSSC), and the Housing Opportunities Commission (HOC).

III. Definitions.

Eligible Employees: Full-time and part-time *non-bargaining unit* employees in the Executive and Legislative branches of the County who are in a telework approved position, have successfully completed their probationary period and have a "successful" performance rating, or have performed at a successful level under an established performance plan at a minimum of six months are eligible to apply to telework.

Eligible Position: An occupational job class determined by a department head in conjunction with department managers and supervisors to be eligible for telework. Individuals in eligible positions may apply for, but are not guaranteed, the option to telework.

Episodic Telework: The employee teleworks on an irregular basis. These arrangements will accommodate a business cycle or projects amenable to being performed at home, rather than in an office setting.

Main Office: The location of the employee's primary workspace and place where the employee normally performs work duties.

Regular Telework: The employee teleworks on a regularly scheduled basis. These arrangements will involve recurring tasks that occur on a monthly basis.

Remote workplace or location: A work site other than the employee's traditional office setting such as the employee's residence.

Telework: Telework is defined as working from a remote work location or workplace instead of traveling to the main office. It is a work alternative available to eligible employees when it would benefit both the agency and the employee.

Telework Coordinator: An individual in the Office of Human Resources responsible for providing departments with technical assistance; maintaining telework records and reports; and gathering and analyzing data on the Telework Program.

Teleworker: A person who, for at least two days a month, works from their home to produce an agreed upon work product.

IV. Objectives

The objectives of the Telework Program are as follows:

- To further support the County's efforts in promoting the organization as an employer of choice.
- To support national and regional efforts to reduce traffic congestion.
- To provide employees with opportunities to enrich their lives by gaining quality time otherwise lost as a result of lengthy commutes through flexible work arrangements such as telework.
- To further enhance employee recruitment and retention efforts.
- To reduce absenteeism, sick leave, and late arrivals; and increase productivity.
- To improve emergency contingency plans.

V. Policy.

Eligibility. Full-time and part-time *non-bargaining unit* employees in the Executive and Legislative branches of the County who are in a telework approved position, have successfully completed their probationary period and have a "successful" performance rating, or have performed at a successful level under an established performance plan at a minimum of six months are eligible to apply to telework.

The department head in conjunction with department managers and supervisors will identify positions appropriate for telework based on the:

- essential functions of the position and its ability to perform off-site with only e-mail and phone support;
- work performance for the position can be measured in a telework arrangement;
- results and productivity can be effectively measured with limited supervisory observation;
- proprietary information of the County department or division can remain confidential; and

- ability to maintain or improve service delivery to internal and external customers.

An employee in a position eligible for telework is not required to telework and has the right to refuse to telework if the option is made available to them. Similarly, all telework requests are subject to recommendation by the manager or supervisor and approval by the Department Head.

A teleworking employee may be restricted from participating in other alternative work schedules.

An employee in the Office, Professional, and Technical (OPT) and Service, Labor and Trades (SLT) bargaining units represented by MCGEO/Local 1994 and employees in the police bargaining units represented by the Fraternal Order of Police Lodge 35 and the firefighter bargaining units represented by IAFF Local 1664 are *not eligible* for telework.

Participation. Telework is a voluntary cooperative arrangement between the County and the employee. An employee who participates in the Telework Program is subject to all County policies and procedures including, but not limited to those regarding confidentiality; disclosure of information; conflict of interest; and acceptable use of information and communications technology resources.

Training. Training is mandatory for all employees eligible to apply for telework interested in teleworking. The employee must attend the training with their manager or supervisor before completing the *Manager/Supervisor-Employee Telework Agreement*. The training will provide employees, managers and supervisors with guidance on how to maximize the benefits of telework and will include information on the application process, teleworker roles and responsibilities, instructions on proper ergonomic positioning of furniture and tips on how to ensure the safety of the employee's home office.

Work space. The employee must designate and maintain a clean, safe workspace that is adequate for work and free of obstructions and distractions at the employee's residence.

An employee must not conduct meetings with customers or co-workers at the employee's residence. When a meeting is scheduled on a day the employee is scheduled to telework, the employee must go to the office to attend the meeting or make alternative arrangements.

An employee injured while working from the employee's residence should follow established County procedures for reporting on-the-job injuries. The County is not liable for injuries to third persons, family members or both in and around the employee's residence.

Telework Schedule and Availability. A telework schedule may include two or more days per month at an employee's residence. The number of days per week or month is a decision to be made by the manager or supervisor in conjunction with the employee. A telework schedule, including specific days and hours, must be agreed upon by the manager or supervisor and the employee. This schedule must include a meal period and breaks. The manager or supervisor and employee must also agree on what should happen if an employee's scheduled telework day falls on a holiday or the employee uses leave on or before a scheduled telework day. The amount of time an employee is expected to work per day or per pay period will not change due to participation in the telework program.

An employee *must* be available by phone, email or both during the scheduled telework hours, with the exception of the meal period and breaks. A teleworking employee may be required by the employee's manager or supervisor to come into the office during a scheduled telework day. The employee must comply with this requirement.

The telework agreement may be suspended or the number of hours or days per week or month the employee teleworks may need to be revisited should office coverage become a problem due to changes in work demands or office staffing.

An employee must not perform personal business or activities during designated telework hours. Personal business or activities include, but are not limited to caring for dependents or making home repairs.

Work performance. An employee's job responsibilities will not change due to participation in the Telework Program. The manager or supervisor may require the employee to submit regular status reports to help judge work performance. A decline in work performance or a decline in service to the employee's internal and external customers may result in termination from the Telework Program.

A teleworking employee will be held to the same performance evaluation standards as other employees in the County.

Overtime, Leave and Compensation. An employee must continue to follow the County's times and attendance standards and adhere to the employee's approved work schedule, including work hours, while teleworking. If an employee becomes sick at any time while teleworking, the employee is required to immediately report the sickness to the employee's manager or supervisor and use sick leave to cover those hours not worked. If an employee must take some other form of leave, the employee is required to request leave from the employee's manager or supervisor immediately and use the leave to cover those hours not worked.

An employee must get advanced manager or supervisory approval before performing overtime work.

An employee's compensation and benefits will not change due to participation in the Telework Program.

An employee must submit bi-weekly timesheets in accordance with the normal schedule.

Inclement weather. During a general emergency in which the main office is closed, a non-essential employee scheduled to telework will not be required to work remotely.

During a liberal leave period a non-essential employee scheduled to telework must work remotely during that period. If the employee chooses not to work remotely on a scheduled telework day during a liberal leave period the employee must notify the employee's manager or supervisor of the employee's leave status and use vacation leave to cover those hours not worked.

Code Red Air Quality Days. An employee is strongly encouraged to telework during a code red air quality day. Managers or supervisors and employees will be notified at least 15 hours in advance of a code red air quality day. Following the announcement of a code red air quality day the employee must immediately discuss the work the employee will perform on that day with the employee's manager or supervisor. A manager or supervisor must not allow an employee to telework on a code red air quality day if the manager or supervisor and employee do not agree on a telework work plan before that day.

Equipment. An employee is responsible for the purchase, installation and maintenance of all equipment (e.g. computer, standard software, desk, printer, telephone, separate data line etc.) used for telework. The employee is responsible for ensuring that the chair used is fully adjustable with lumbar support and the workstation is properly adjusted.

An employee must have a phone and may be required by their manager or supervisor to check voice mail messages on a regular basis.

Supplies. An employee may take supplies needed for work at the telework location from the employee's main office with supervisory approval. The employee will not be reimbursed for out-of-pocket expenses for supplies regularly available at the main office.

Confidentiality. An employee is responsible for protecting the security and integrity of data, information, and paper files used when teleworking.

Data collection. An employee and the employee's manager or supervisor must participate in studies, inquires, reports or analyses relating to telework at the County's direction.

VI. Procedure.

Application Procedure. Employees eligible to *apply* to the program must undergo the application process to determine if the employee is eligible to *participate* in the program. An eligible employee must complete the Telework Program application process detailed in *10 Steps to Telework* to determine if they are eligible to *participate* in the Program.

Approval. If the manager or supervisor and employee agree on a mutually beneficial telework arrangement, the manager or supervisor must forward a copy of the *Manager/Supervisor-Employee Telework Agreement* to the department director. If the manager or supervisor and employee do not agree on a mutually beneficial telework arrangement, the manager or supervisor must forward a copy of the agreement with a summary of the points on which the manager or supervisor and employee agreed and disagreed attached to the agreement and forward to the department director. The department director must review the materials provided and approve or disapprove the employee's request to telework; or make suggestions on the points the manager or supervisor and the employee disagree on to help them reach agreement on a telework arrangement. If the request is not approved, the department director must give the employee the reason for not approving the request. The department director's decision is final and is not grievable.

Renewal. An employee in conjunction with the employee's manager or supervisor will be required to complete renewal paperwork annually.

Change in status. An employee will be required to complete a new set of application materials if the employee's job and manager or supervisor changes. The employee must first check the eligible list to make sure the job is an approved telework position. The employee must then perform at a successful level under an established performance plan for a minimum of six months before completing a new set of application materials. If the employee is approved to telework, the agreement under the employee's former manager or supervisor, job or both will be terminated and replaced by a new approved agreement.

If an employee's manager or supervisor changes but the employee's job does not the employee must share the telework agreement packet with the employee's new manager or supervisor.

If an employee's job changes but the employee's manager or supervisor does not, the employee must first check the eligible list to make sure the job is an approved telework position. If the job is eligible, the employee will not be required to complete a new set of application materials if their job changes but their manager or supervisor does not.

Termination. Telework is not a formal, universal employee benefit but an alternative method of meeting the needs of the County. Since telework is a privilege, departments have the right to refuse to make telework available to an employee and to terminate a telework arrangement with notice to the employee. A teleworking employee has the right to terminate a telework arrangement with notice to the employee's manager or supervisor.

If termination is initiated by the manager or supervisor, the manager or supervisor must give the employee 10 working days prior notice. If initiated by the employee, the employee must give the manager or supervisor 5 working days prior notice. The *Notice to Terminate Telework Agreement* form must be completed and signed by both the manager or supervisor and employee regardless of who initiates the termination. The employee will be responsible for returning all supplies and work products in a timely manner once an agreement is terminated. An employee may apply to participate in the Telework Program again after their telework agreement has been terminated. The length of time an employee must wait before applying to the program again is at the discretion of the employee's manager or supervisor.

VII. Responsibilities.

Employee.

Follow the provisions in the *Montgomery County Telework Program Policy*.

Work with their manager or supervisor to come to an agreement on, and observe the terms and conditions of the telework agreement.

Follow all applicable laws, rules, regulations, policies and procedures to ensure the security and confidentiality of official documents and records.

Manager and Supervisor.

Encourage active communication via E-mail, voice mail, and telephone between teleworkers and main office staff to ensure adequate interaction.

Ensure that telework does not burden main office staff through equitable distribution of workload

Review teleworking employee's work plan prior to employee's scheduled telework day(s).

Periodically evaluate the effectiveness of the telework arrangement.

Encourage employees to telework during code red air quality days.

Department Director.

Periodically evaluate the effectiveness of telework in the department by meeting with managers or supervisors managing teleworking employees.

Department of Technology Services

TBD

Risk Management

Provide training on proper ergonomic positioning of office furniture and tips on office safety.

Office of Human Resources.

Designate a telework coordinator to serve as the lead administrator of the Telework Program.

Provide employees and managers or supervisors with technical assistance.

Coordinate the training of employees eligible to telework and managers or supervisors with eligible employees.

Maintain and update the Montgomery County Telework Program policies and guidelines and application and promotional materials.

Provide the Management and Fiscal Policy Committee with information on the status of telework in the Montgomery County Government on an on going basis.

VIII. Program evaluation and outcome measures.

An employee and an employee's manager or supervisor must participate in all studies, inquires, and analyses of the Telework Program. Data compiled may be made available to the general public, organizations, businesses, and the press.

Evaluation and outcome measurements. Under the guidelines set by the Interagency Telework Program for County Agencies, the County must collect the following information annually from each teleworker, using a uniform questionnaire:

- Name, title, department, etc.;
- Worksite location(s) on non-telework days;
- Number of miles between employee's home and main office;
- Means of transportation on non-telework days;
- Usual commute routes on non-telework days;
- Type of telework site;
- Address of telework site;
- Number of days employee is scheduled to telework per month; and
- Number of miles from employee's home to the telework site.

Based on the information collected above, the County must report the following information to the Management and Fiscal Policy Committee on an ongoing basis:

- Number of employees in positions eligible to telework;
- Number of active teleworkers;
- The average number of days employees are scheduled to telework per month;
- Total number of days employees teleworked overall;
- Average number of miles traveled between teleworker's homes and main office on non-telework days;

- Means of transportation on non-telework days and
- Top ten commuter routes typically traveled by teleworkers on non-telework days.

Montgomery County Interim Telework Program Questions & Answers

About Telework

What is telework?

Telework is defined as working from a remote work location or workplace instead of traveling to a department or division office. A successful teleworking employee is just as productive as employees working in the main office.

What are the benefits of telework?

There are numerous benefits to teleworking for both the employer and the employee. For the employer benefits include: strengthened employee recruitment and retention, reduced absenteeism, sick leave, and late arrivals, and enhanced public recognition as an innovative community partner. For the employee: reduced long, congested commutes making late arrivals a thing of the past, improved productivity resulting from fewer interruptions and distractions, and improved balance between work and family life.

Who else is teleworking?

With the launch of its Telework Program, the Montgomery County Government will be joining a number of other county governments across the country providing their employees with the opportunity to work remotely such as, Fairfax County, Virginia, Westchester County, New York, and Los Angeles County, California.

How the Montgomery County Telework Program Works

What is the Montgomery County Telework Program?

The Montgomery County Telework Program is a community friendly program that provides an alternative work arrangement for employees.

What is the duration of the interim period?

The interim period for the Telework Program will be for one full calendar year.

Is telework a new benefit for County employees?

No. Telework is not a formal benefit, nor is it an entitlement; rather telework is an arrangement that the County may choose to make available to some employees when a mutually beneficial situation exists.

ELIGIBILITY

Am I eligible to apply the Montgomery County Telework Program?

Full-time and part-time non-bargaining unit employees in the Executive and Legislative branches of the County who are in a telework approved position, have successfully completed their probationary period and have a "successful" performance rating or better, or have performed at a successful level or better under an established performance plan at a minimum of six months are eligible to apply to telework.

An employee eligible to *apply* to the program must undergo the application process to determine if s/he eligible to *participate* in the program (see *10 Steps to Telework* for more information on the application process).

Are bargaining unit employees eligible to apply in the Montgomery County Telework Program?
Employees in the Office, Professional, and Technical (OPT) and Service, Labor and Trades (SLT) bargaining unit represented by MCGEO/Local 1994 and employees in the police bargaining unit represented by the Fraternal Order of Police Lodge 35 and the firefighter bargaining unit represented by IAFF Local 1664 are *not eligible* for telework.

If I am eligible to telework am I required to participate in the Telework Program?
No. An eligible employee is not required to telework and has the right to refuse to telework if the option is made available to them.

How are positions eligible for telework identified?
Department directors in conjunction with managers and supervisors will identify eligible positions using guidance on how to select positions from OHR.

APPLICATION PROCEDURE

What is the application procedure?
An eligible employee must complete the Telework Program application process as detailed in *10 Steps to Telework*.

Will I be required to renew my telework agreement?
Yes. If the Telework Program continues beyond the year long interim period an employee, in conjunction with the employee's manager/supervisor, will be required to complete renewal paperwork annually. An employee and the employee's manager/supervisor will be required to complete the *Telework Renewal Request* form and the employee must complete the *Information for Data Collection* form. The *Telework Location & Schedule* and the *Workspace Self-Certification Checklist and Safety Guidelines for the Telework location* form must also be completed if the employee's telework location and or schedule have changed.

How many days a week/month may I telework?
This is a decision to be made by the manager/supervisor and the employee. A regular telework schedule, including specific days and hours, must be agreed upon by the manager/supervisor and the employee. The Office of Human Resources recommends that employees telework at least two full work days a month.

How long am I required to participate in the Telework Program?
There is no minimum or maximum amount of time an employee is required to participate in the program. Teleworking employees and their manager/supervisor may terminate the telework agreement at any time with or without cause and with notice.

What is the procedure for terminating a telework agreement?
If termination is initiated by the manager/supervisor s/he must give an employee 10 working days prior notice. If initiated by an employee s/he must give his/her manager/supervisor 5 working days prior notice. The *Notice to Terminate Telework Agreement* form must be completed and signed by both the manager/supervisor and employee regardless of who initiates the termination. An employee will be responsible for returning all supplies and work products no later than 10 business days from the date the termination is approved by the department director.

If my telework agreement is terminated may I apply to participate in the Telework Program again?
Yes. An employee may apply to participate in the Telework Program again after their telework agreement has been terminated. The length of time an employee must wait before applying to the Program again is at the discretion of the employee's manager/supervisor.

If my manager/supervisor changes but my job does not, do I need to complete a new set of application materials?

No. A teleworking employee will not be required to complete a new set of application materials if their manager/supervisor changes but their job does not. A teleworking employee is responsible, however, for sharing his/her telework agreement packet with her/his new manager/supervisor. It is at the discretion of the manager/supervisor to continue or terminate the telework agreement.

If my job changes but my manager/supervisor does not, do I need to complete a new set of application materials?

First, a teleworking employee must check the eligible list to make sure the job is an approved telework position. If the job is eligible, the employee will not be required to complete a new set of application materials if their job changes but their manager/supervisor does not. It is at the discretion of the manager/supervisor to continue or terminate the telework agreement.

If my job and manager/supervisor changes, do I need to complete a new set of application materials?

Yes. First, a teleworking employee must check the eligible list to make sure the job is an approved telework position. If the job is eligible, the employee must perform at a successful level or better under an established performance plan for a time period determined by his/her manager/supervisor before completing a new set of application materials if their job and manager/supervisor changes.

OVERTIME, LEAVE AND COMPENSATION

Will I be eligible for overtime when teleworking?

An employee who is "non-exempt" for FLSA purposes will be required to get advanced supervisory approval before performing overtime work.

What do I do if I become sick or need to take some other form of leave during a scheduled telework day?

If an employee becomes sick during any of the hours regularly scheduled for teleworking, the employee is required to immediately report their sickness to their manager/supervisor and use sick leave to cover those hours not worked. If an employee must take some other form of leave, the employee is required to request leave from their manager/supervisor immediately and use the leave to cover those hours not worked.

Will my compensation and benefits change if I participate in the Telework Program?

A teleworking employee's compensation and benefits will not change due to participation in the Telework Program.

PROGRAM EVALUATION

Will there be an evaluation of the program?

In order to track the progress of the Telework Program and properly address the needs of teleworking employees the Montgomery County Government will periodically conduct evaluations of the program. Participants of the Telework Program will be required to participate in all studies, inquires, and analyses.

REMOTE OFFICE LOCATION

Where can I telework?

At this time an employee approved to telework may only work from a workspace designated for telework in their home.

May I work anywhere in my home when teleworking?

An employee must designate suitable workspace in their home for teleworking. See the *Work Space Self-Certification Checklist and Safety Guidelines for the Telework Location* for information on what a suitable workspace is.

Am I required to have homeowner's insurance or renter's insurance in order to participate in the Telework Program?

No. An employee teleworking from her/his home will not be required to have homeowner's or renter's insurance. An employee should find out whether or not their homeowner or renter's insurance policy covers teleworking prior to participating in program.

May I meet with customers or co-workers in my home when teleworking?

A teleworker may not conduct meetings in their home. When a meeting is scheduled on a day an individual teleworks, the employee must go to the office to attend the meeting or make alternate arrangements (e.g. conference call).

What should I do if injured while working at my remote office?

An employee injured while working from her/his home should follow established County procedures for reporting on-the-job injuries.

How will teleworking affect my current dependent care situation?

Telework is not a substitute for dependent care. An employee may, however, be able to use the flexibility permitted by telework to maintain work responsibilities while caring for dependents.

May I bring confidential information to my remote office?

The manager/supervisor and employee must develop a plan to ensure the confidentiality of proprietary information before the employee takes it to their home.

I do not have a computer, can I telework?

Depending on the type of work to be performed, an eligible employee may not need to use a computer while teleworking.

Will the County provide me with equipment (i.e. computer, printer, software) to telework?

No. The County will not provide an employee with equipment to telework. Employees will be responsible for purchasing, installing, and maintaining equipment for their remote office.

May I bring supplies from the main office to my remote office?

A teleworking employee may get all supplies needed for work at their remote office from their main office with manager/supervisory approval. Out-of-pocket expenses for supplies regularly available at the main office will not be reimbursed.

Do I have to submit something that outlines the tasks I plan to work on while teleworking?

An employee may use the *Work Plan Template* to facilitate a discussion with their manager/supervisor on the work to be performed while teleworking.

Will I be able to access the network remotely using a virtual private network (VPN)?

Yes. Please see the *Technology Requirements and Procedures* form for more information.

Will I be reimbursed for placing business related long distance phone calls from my home?

No. Employees will be responsible for paying the cost of business related long distance calls. Please see the *Technology Requirements and Procedures* form for more information.

What are the tax implications of teleworking?

Tax implications related to the employee's home work space are the responsibility of the employee. You may Consult IRS Publication 587, "Business Use of Your Home" for information on tax implications.

What forms do I need to complete if I switch from one type of remote office to another?

If the location of your remote office changes you will need to provide the Office of Human Resources and your manager/supervisor with the address and phone number for the office.

TRAINING

Will I receive training on how to successfully telework?

Training is mandatory for all eligible employees interested in participating in the Telework Program. The employee will be required to attend the training with their manager/supervisor before completing the *Manager/Supervisor-Employee Telework Agreement*. The training will provide employees, managers, and supervisors with guidance on how to maximize the benefits of telework and will include information on the application process, teleworker roles and responsibilities, instructions on proper ergonomic positioning of furniture and tips on how to ensure the safety of the employee's home office.

Will manager/supervisors receive training on how to successfully supervise teleworking employees?

All managers/supervisors with non-bargaining unit employees will be required to attend training on how to manage teleworking employees successfully.

What Successful Teleworking Is

What are the characteristics of a successful teleworker?

Successful telework employees tend to be those with strong time management skills, exceptional communication skills, the ability to work independently, prioritize workload and are technologically literate.

What type of management style is conducive to successfully supervising teleworkers?

Successful managers of teleworkers are typically those who communicate well with their employees, measure performance by results, and are able to define specific tasks and expectations. Other management characteristics include a positive attitude toward teleworking, an ability to trust the employee's ability to telework, good organization and planning skills, an ability to establish clear objectives, give regular formal feedback and is flexible.

Will productivity decrease if employees work from a remote location unsupervised?

Survey results from employee participants in past telework programs show a marked improvement in productivity. Productivity increases because employees have fewer distractions and interruptions, work at their best times, and avoid the stress of the commute to work.

What kind of adjustments in the main office will be needed to ensure that telework is successful?

Flexibility on the part of the manager/supervisor and employee, as well as staff at the main office is the key. The *Manager/Supervisor-Employee Telework Agreement* will help to facilitate a discussion regarding necessary adjustments that will need to be made on the part of the manager/supervisor, employee and the main office.

Additional Information

Who may I contact for additional information about the Telework Program?

You may contact NAME, Telework Coordinator, in the Office of Human Resource's at (240) 777-5000. Information about the program can also be found on-line in the HR Resource Library at WEBSITE ADDRESS

Where may I find more information about telework in general?

There are a number of websites with information about telework. Here are a few you may want to explore:

- Commuter Connections
<http://www.mwcoq.org/commuter/Bdy-Telework.html>
- Commuter Choice, Maryland Dept of Transportation
http://www.e-mdot.com/CommuterChoice/Resources/Copy_MDresources
- Mid-Atlantic Telecommuting Advisory Council
<http://www.midatlantictelework.com/>
- International Telework Association and Council (ITAC)
<http://www.telecommute.org/>

SELECTING POSITIONS ELIGIBLE FOR TELEWORK

Instructions: Use this worksheet to identify eligible positions for telework.

Position Title _____

Department _____

Division _____

Does the position meet the following criteria?

- service delivery to the internal and external customers will be maintained or improved;
- the position is a non-bargaining unit position;
- the essential functions of the position can be performed off-site with only e-mail, VPN (virtual private network), and phone support;
- access to necessary reference materials is available through photocopying, faxing, or electronic transfer of documents
- work performance for the position can be effectively measured in a telework arrangement;
- results and productivity can be effectively measured with limited supervisory observation; and
- proprietary and confidential information of the County department or division can be maintained as confidential.

If the position meets all of the criteria above, the position is eligible for telework. Please note that selecting positions eligible for telework is different from approving employees for telework (see the *Interim Telework Program Policy* for more information).

Montgomery County Interim Telework Program

10 STEPS TO TELEWORK

Step 1

Read the *Montgomery County Interim Telework Program Policy* and the *Montgomery County Interim Telework Program Questions and Answers* and educate yourself on telework and the County's program. If you meet all of the following criteria you are eligible to apply to telework and may proceed to Step 2: (1) are a non-bargaining unit employee, (2) are in a telework approved position, (3) have successfully completed your probationary period and have a "successful" performance rating or better, or have performed at a successful level or better under an established performance plan at a minimum of six months.

Step 2

Complete the *Telework Suitability Self-Assessment*. If you score a 27 or higher, forward the form to your manager/supervisor and proceed to Step 3.

Step 3

Meet with your manager/supervisor to discuss the results of your self-assessment and the results of the *Manager/Supervisor Assessment of Employee Suitability for Telework* (this meeting should occur within 10 days of the employee submitting the *Telework Suitability Self-Assessment* to his/her manager/supervisor). If your manager/supervisor recommends that you participate in telework training go to Step 4. If your manager/supervisor does not recommend that you participate in telework training you and your manager/supervisor should discuss the skills you will need to develop and/or enhance to be successful in telework.

Step 4

Forward the *Telework Suitability Self-Assessment* and the *Manager/Supervisor Assessment of Employee Suitability for Telework* to your Department Director. The Department Director will approve or disapprove you to participate in telework training. If you are approved go to Step 5. If you are disapproved; you and your manager/supervisor should discuss the skills you will need to develop and/or enhance to be successful in telework.

(Note: Where applicable a Division Chief/Manager may need to review the manager/supervisor's recommendation before it is forwarded to the Department Director for approval)

Step 5

Attend telework training with your manager/supervisor.

Step 6

Complete the *Manager/Supervisor-Employee Telework Agreement* with your manager/supervisor (this agreement should be completed within 10 days from the date of the telework training). One of two scenarios will result from completion of the agreement:

(1) If you and your manager/supervisor agree on a mutually beneficial telework arrangement, a copy of the agreement must be forwarded to the Department Director. The Department Director will review the materials provided and approve or disapprove you for telework; or

(2) If you and your manager/supervisor do not agree on a mutually beneficial telework plan, a copy of the agreement with a summary of the points on which you and your manager/supervisor agreed and disagreed must be forwarded to the Department Director. The Department Director will review the materials provided and approve or disapprove

you to telework; or make suggestions on the points you and your manager/supervisor disagree on to help you reach an agreement on a telework plan.

If you are approved go to Step 7. If you are disapproved, you and your manager/supervisor should discuss the skills you will need to develop and/or enhance to be successful in telework.

(Note: Where applicable a Division Chief/Manager may need to review the agreement before it is forwarded to the Department Director for approval)

Step 7

If approved complete the following forms and go to Step 8:

- *VPN Request form* (Note: Complete the VPN request form only if you need VPN access. If you request VPN access and are disapproved you will need to determine how to meet the VPN requirements or re-evaluate the work you will perform while teleworking, i.e., performing tasks that do not require VPN access. Be sure to read the *Technology Requirements & Procedures* form and use the form to determine your technology needs for telework.)
- *Work Space Self-Certification Checklist and Safety Guidelines for the Telework Location*
- *Telework Work Location and Schedule*
- *Information for Data Collection*
- *Telework Agreement and Disclosure of Binding Terms*

Step 8

Use the *Telework Forms Checklist* to make sure you have completed all of the application materials. Make 2 copies of all application materials. Forward the original set to the Telework Coordinator in the Office of Human Resources, forward a copy of the set to your manager/supervisor and keep a set for your own records.

Step 9

Create a telework work plan and submit it to your manager/supervisor for review. (Note: Although this is optional, employees are strongly encouraged to complete the *Work Plan Template*. Your manager/supervisor may require you to submit regular status reports to help judge work performance)

Step 10

Begin teleworking.

INFORMATION FOR DATA COLLECTION

Instructions: In order to track the progress of the Telework Program and properly address the needs of teleworking employees the Montgomery County Government will periodically conduct evaluations of the program. As a participant of the Telework Program you will be required to be a part of all studies, inquires, and analyses of the Program. Please complete the questions below.

Note: Click on the shaded boxes and enter the requested data; the boxes will automatically expand. Double click the gray boxes and select "checked."

Employee Name

Position Title

Department Division

Remote office address

Main office address

1. How long have you been in your current position? years/ months

2. What is your most recent Performance Rating?

3. Are you currently on another flexible work schedule? Yes No
 - a) If yes, please name
 - b) Do you plan to continue this schedule in addition to teleworking? Yes No

4. What are your primary job responsibilities?

5. Are you responsible for providing direct service to customers? Yes No
 - a) If yes, what effect of service delivery to your customers do you anticipate if you telework? (please describe)

6. Are you responsible for supervising or supporting staff that provide direct services to customers? Yes No
 - a) If yes, what effect of service delivery to the staff you supervise or support do you anticipate if you telework? (please describe)

7. What type of telework will you do? Regular Episodic
 - a) If regular, how many days per month are you scheduled to telework?

b) What day(s) will you telework? (please check all that apply)

- Monday Tuesday Wednesday Thursday Friday

8. What types of tasks will you perform while teleworking? (check all that apply)

- Analysis Data Management Contract Preparation/Review
 E-mail Phone Work Programming
 Research Word Processing Writing
 Other (please describe)

9. Will you need to transfer electronic and/or paper files to and from your telework site?

- Yes No

a) If yes, do the files contain sensitive information that will require you to protect the security and integrity of the files? Yes No

10. What benefits do you expect to gain from teleworking? (please check all that apply)

- Reduce time spent commuting to and from my primary office.
 Increase productivity by working in a quieter work environment
 Improve work-life balance
 Other (please describe)

11. What benefits do you expect your department or main office to gain from you teleworking?
(please list)

12. What type of support will you need from your supervisor in order for to be most effective while teleworking? (please describe)

13. What is the one-way distance from your home the main office? miles

14. What time do you typically leave home to get to the main office? min/hr

15. What time do you typically leave the main office to get to your home? min/hr

16. How long is your commute on average: From home to work? hrs mins
From work to home? hrs mins

17. What is your primary mode of travel to and from the main office?

- Drive alone Car or Van Pool Public Transportation Walk or Bike
 Other (please describe)

18. What is your primary commute route?

TELEWORKER WORK LOCATION AND SCHEDULE

Instructions: Using the *Manager/Supervisor-Employee Telework Agreement*, please complete Parts 1 & 2.

Note: Click on the shaded boxes and enter the requested data; the boxes will automatically expand. Double click the gray boxes and select "checked."

Employee Name Position Title

Manager or Supervisor Name

Department Division

PART 1 Location

Main Office Address

Main Office Phone

Remote Office Address

Remote Office Phone

PART 2 Type of Telework

Regular Episodic

If regular please complete the schedule below.

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Hours					
Daily Lunch Period and Breaks					
Location					

*For location please use "R" for Remote Office and "M" for Main Office

File:
 Original- OHR
 Copy- Manager/Supervisor, Employee

TELEWORK PROGRAM FORMS CHECKLIST

Please use the following checklist to ensure that you have completed the required telework forms prior to submitting original copies of your telework application materials to the Office of Human Resources.

- Telework Suitability Self-Assessment
- Manager/Supervisor Assessment of Employee Suitability for Telework
- Manager/Supervisor-Employee Telework Agreement
- Workspace Self-Certification Checklist and Safety Guidelines for the Telework Location
- Telework Work Location & Schedule
- Information for Data Collection
- Telework Agreement and Disclosure of Binding Terms
- Technology Requirements and Procedures
- Telework VPN Access Request Form

TELEWORK TECHNOLOGY GUIDELINES

Note: this document is a working draft

Instructions: This form should be read and understood by an employee who: 1) has been approved for telework by their department director, and 2) will access email, network drives, or voicemail remotely. Complete the requirements sections to determine if you meet the technology requirements. Keep this document for your records. You DO NOT have to submit this document.

TOPIC	REQUIREMENTS (please check)	PROCEDURE
Remote Access— Webmail	<input type="checkbox"/> Any computer with Internet service and Internet Explorer web browser.	Instruction: (1) To access email via OWA (Outlook Web Access) go to http://mail.montgomerycountymd.gov . (2) Click "Accept". Enter your user name and password (Note: this user name and password is the same as the one you use to log-in to your main office computer). Please note that some full Outlook client features will not be available when using OWA. The full Outlook client is available only at the main office or, if using a County-owned laptop that is used as your primary main office computer.
Remote Access— VPN Includes: Access to County public file folders, Email, specified servers, Internet and special applications.	Computer (any one of these is acceptable) <input type="checkbox"/> County Primary PC or Laptop <input type="checkbox"/> County Secondary PC or Laptop <input type="checkbox"/> Personal PC or Laptop <input type="checkbox"/> Operating System (all of these are required) -Windows 98, ME, 2000 or XP -300 MHz Pentium (minimum) -64 MB memory (minimum) -10 MB free disk space (minimum) -Internet Browser (Internet Explorer Version 6.0 or better)	Instructions: (1) Once you receive approval to telework from your department director complete the <i>VPN Request Form</i> . A copy of this form is available in Outlook under, Public Folders/All Public Folders/MCG/VPN or you may call the IT Help Desk at 270-777-2828 to request the form. (2) Send the completed <i>VPN Request</i> form by email to your manager/supervisor for VPN access approval. Your manager/supervisor will approve or

*A VPN license fee of \$200.00 will be charged for

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<p>each employee requesting VPN access.</p> <p>**Access to unique departmental applications may be granted by your departmental IT contact.</p>	<p>Internet Service (any one of these is acceptable)</p> <p><input type="checkbox"/> Cable Modem <input type="checkbox"/> DSL <input type="checkbox"/> ISDN <input type="checkbox"/> T1 or higher (dial-up is not permitted for VPN access)</p> <p>Virus/Spyware protection (any one of these is acceptable)</p> <p><input type="checkbox"/> Symantec AntiVirus <input type="checkbox"/> Spybot <input type="checkbox"/> McAfee <input type="checkbox"/> Adaware <input type="checkbox"/> TrendMicro <input type="checkbox"/> Other SpyWare: <input type="checkbox"/> Other AV:</p> <p>Access to unique departmental applications ("special" computer applications)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, explain:</p>	<p>disapprove you for VPN access. If approved your manager/supervisor will submit the form to the IT Helpdesk at helpit@montgomerycountymd.gov and copy departmental IT contact on the email.</p> <p>(3) If approved for VPN access you will receive instructions from the IT Helpdesk on how to download and set up VPN on your computer.</p>
<p>Voicemail</p>	<p><input type="checkbox"/> Phone with voicemail or answering machine (a second line is optional)</p>	<p>Instructions:</p> <p>(1) Dial 240-777-1010 or 1-800-343-7880 to access the County's voicemail system.</p> <p>(2) Once in the system, press #, and then enter your mailbox number and security code to listen to your voicemail messages.</p> <p>(3) To contact other County employees, enter their five digit extension number immediately after entering the system or after checking your voicemail, enter 9 then 0 and enter the employee's five digit extension number. (Note: If your call is sent to the employee's voicemail and you wish to contact another employee</p>

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Montgomery Government County Interim Telework Program

		instead, you may dial the five digit extension of another employee. Also please note that only extensions that begin with "7" or "3" may be accessed using these instructions.)
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Additional Information:

Technical Support:

Telework technical support matrix. Refer to the following technical support matrix to find your corresponding support resources.

Issue	County-owned Primary Computer	County-owned Secondary or Non-seat Computer	Non-County owned computer
Hardware	IT Helpdesk	Department IT Staff or Hardware Maintenance Contract	No Support
ISP/Internet Connectivity	No Support	No Support	No Support
AD Login/PC Login	IT Helpdesk	IT Helpdesk	IT Helpdesk
VPN Access Problem	IT Helpdesk	Department IT Staff	No Support
OS and Standard Application Software	IT Helpdesk	Department IT Staff	No Support
Home LAN/Printer	No Support	No Support	No Support

*Standard Application Software includes Microsoft Office, Internet Explorer, Symantec AntiVirus, IBM Pcomm and Juniper.

County-owned primary computer. Technical support for an employee using County owned primary computer is available via the IT Help Desk at 240-777-2828 during normal business hours. Employees should contact the IT Help Desk for work-related issues only. If a problem cannot be resolved remotely, employees must schedule a time to bring computer to IT Help Desk for trouble shooting. The IT Help Desk will not visit an employee's telework location to trouble shoot under any circumstances. IT Help Desk will only support telework at an employee's registered primary telework location. Secondary home, hotel room, Starbucks and Silver Spring WiFi are not supported under this program. IT Help Desk does not support home network and/or Internet connection at home. Limited support is available if you are accessing a mainframe application via the VPN.

County-owned secondary or non-seat computer. Technical support for an employee using a secondary or non-seat County computer is ONLY available via the employee's department IT staff. Employees should only contact department IT staff for work-related issues. If a problem cannot be resolved remotely, employees must schedule a time to bring laptop to department IT staff for troubleshooting. The department IT staff will not visit employees' telework location to trouble shoot under any circumstances. Department IT staff will only support telework at the employee's registered primary telework location. Secondary home, hotel room, Starbucks and Silver Spring WiFi are not supported under this

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program. Department IT staff does not support home network and/or Internet connection at home. Limited support is available if you are accessing a mainframe application via the VPN.

Non-County owned computer: Technical support is not available to an employee using a non-County owned computer while teleworking. In order to keep VPN connectivity secure, periodic security checks may be performed on an employee's PC. If your computer fails a security check, a warning screen, detailing the requirement that your computer does not meet will appear.

Termination of the Telework Agreement

If your telework agreement is terminated, you or your supervisor should notify the IT Helpdesk by email at helpit@montgomerycountymd.gov.

TELEWORK SUITABILITY SELF-ASSESSMENT

Instructions: This self-assessment will evaluate your suitability for telework by identifying your strengths as well as barriers that you may need to overcome. Complete the assessment and forward it to your manager/supervisor. Your manager/supervisor will complete the *Manager/Supervisor Assessment of Employee Suitability for Telework*. You and your manager/supervisor will be required to meet to discuss the results of the two assessments. Based on your manager/supervisor's review of the two assessments and your discussion with her/him, he/she will recommend or not recommend that you participate in telework training. The assessments will then be forwarded to the Department Director who will approve or disapprove you for the training. (Note: In some departments manager/supervisor's decision will need to be reviewed by a Division Chief or Manager before it is forwarded to the Department Director)

Note: Double click the gray boxes and select "checked."

Employee Name Position Title

Manager or Supervisor Name

Department Division

PART 1 Self-Assessment

Please complete the following 4 tables to determine whether the characteristics of your job, and your skill set, work style and attitude are suitable for teleworking. Rate yourself on each of the factors below by circling the appropriate category (i.e. low, medium, high). Add up each column and calculate the grand total for each of the 4 factors.

1. Job Characteristics

JOB CHARACTERISTICS	Low	Medium	High	
Adaptability of current job to telework	1	2	3	
Amount of face-face contact with co-workers or team required	1	2	3	
Amount of face-face contact with customers/clients required	1	2	3	
Degree to which communications via phone is required	1	2	3	
Degree to which communications via e-mail is required	1	2	3	
Degree to which communications via fax is required	1	2	3	
Amount of in-office reference materials, databases or other resources required	1	2	3	
Amount of work done using confidential information	1	2	3	
Totals				= 124

2. Skill Factors

SKILL FACTORS	Low	Medium	High
Organizational and planning skills	1	2	3
Project management skills	1	2	3
Time management skills and ability to structure time in an unstructured environment	1	2	3
Ability to set goals for self and follow through on them	1	2	3
Self-discipline/ability to manage potential friction between personal and work commitments	1	2	3
Communications skills: verbal	1	2	3
Communications skill: written	1	2	3
Ability to initiate contact with manager or supervisor	1	2	3
Level of technology literacy	1	2	3
Totals:			= 127

3. Work Style Factors

WORK STYLE FACTORS	Low	Medium	High
Ability to work productively without needing supervision or frequent feedback	1	2	3
Tendency to ask for advice or input when needed	1	2	3
Discipline regarding work commitments	1	2	3
Ability to thrive in isolated work environments with no co-workers present	1	2	3
Self-motivation, self-discipline, ability to avoid procrastination	1	2	3
Ability to work confidently in unfamiliar or constantly changing situations	1	2	3
Independence/ability to self-manage	1	2	3
Ability to manage supervise staff remotely (please complete if you are a manager or supervisor)	1	2	3
Ability to meet deadlines	1	2	3
Reliability regarding work commitments	1	2	3
Totals:			= 130

4. Attitude Factors

ATTITUDE FACTORS	Low	Medium	High	
Desire for schedule flexibility	1	2	3	
Willingness to try new ways of working	1	2	3	
Interest and enthusiasm about teleworking	1	2	3	
Totals:				= 19

Total Score: 19/90

PART 2 Interpreting Your Score

<u>Score</u>	<u>Recommendation</u>
0-26	You need to develop your skills extensively and gain experience on the job before starting a telework arrangement.
27-58	You have good potential to be successful in telework, although you may need training, support and/or experience to overcome any personal or other barriers before starting to telework.
59-90	You should be solidly successful in telework and your success is likely to increase over time as you gain experience and overcome any personal barriers.

PART 3 Employee Signature

Employee Signature

Date

File:
Original- OHR
Copy- Manager/Supervisor, Employee

MANAGER/SUPERVISOR ASSESSMENT OF EMPLOYEE SUITABILITY FOR TELEWORK

Instructions: When you receive the *Telework Suitability Self-Assessment* from an employee eligible to apply to telework you will need to complete this form. The purpose of the assessment is to evaluate the employee's readiness for telework. Please be sure to refer to the employee's performance evaluation before completing the assessment. Once completed you must meet with the employee to discuss the results of the two assessments (this meeting should occur within 10 days of the employee submitting the *Telework Suitability Self-Assessment* to his/her manager/supervisor). Based on a review of this assessment and the *Telework Suitability Self-Assessment*, and your discussion with the employee you will recommend or not recommend that the employee participate in telework training. The assessments should then be forwarded to the department director who will approve or disapprove the employee for telework training. (Note: In some departments manager/supervisor's decision will need to be reviewed by a Division Chief or Manager before it is forwarded to the Department Director)

Note: Click on the shaded boxes and enter the requested data; the boxes will automatically expand. Double click the gray boxes and select "checked."

Employee Name Position Title

Manager or Supervisor Name

Department Division

PART 1 Manager/Supervisor Assessment

Please complete the following 4 tables to determine whether the characteristics of your employee's job, and skill set, work style and attitude are suitable for teleworking. Rate your employee on each of the factors below by circling the appropriate category (i.e. low, medium, high). Add up each column and calculate the grand total for each of the 4 factors.

1. Job Characteristics

JOB CHARACTERISTICS	Low	Medium	High
Adaptability of current job to telework	1	2	3
Amount of face-face contact with co-workers or team required	1	2	3
Amount of face-face contact with customers/clients required	1	2	3
Degree to which communications via phone is required	1	2	3
Degree to which communications via e-mail is required	1	2	3
Degree to which communications via fax is required	1	2	3
Amount of in-office reference materials, databases or other resources required	1	2	3
Amount of work done using confidential	1	2	3

information				
Totals:				= 124

2. Skill Factors

SKILL FACTORS	Low	Medium	High	
Organizational and planning skills	1	2	3	
Project management skills	1	2	3	
Time management skills and ability to structure time in an unstructured environment	1	2	3	
Ability to set goals for self and follow through on them	1	2	3	
Self-discipline/ability to manage potential friction between personal and work commitments	1	2	3	
Communications skills: verbal	1	2	3	
Communications skill: written	1	2	3	
Ability to initiate contact with manager or supervisor	1	2	3	
Level of technology literacy	1	2	3	
Totals:				= 127

3. Work Style Factors

WORK STYLE FACTORS	Low	Medium	High	
Ability to work productively without needing supervision or frequent feedback	1	2	3	
Tendency to ask for advice or input when needed	1	2	3	
Discipline regarding work commitments	1	2	3	
Ability to thrive in isolated work environments with no co-workers present	1	2	3	
Self-motivation, self-discipline, ability to avoid procrastination	1	2	3	
Ability to work confidently in unfamiliar or constantly changing situations	1	2	3	
Independence/ability to self-manage	1	2	3	
Ability to manage supervise staff remotely (please complete if you are a manager or supervisor)	1	2	3	
Ability to meet deadlines	1	2	3	
Reliability regarding work commitments	1	2	3	
Totals:				= 130

4. Attitude Factors

ATTITUDE FACTORS	Low	Medium	High	
Desire for schedule flexibility	1	2	3	
Willingness to try new ways of working	1	2	3	
Interest and enthusiasm about teleworking	1	2	3	
Totals				= /9

Total Score: /90

PART 2 Interpreting the Score

<u>Score</u>	<u>Recommendation</u>
0-26	Your employee needs to develop his/her skills extensively and gain experience on the job before starting a telework arrangement.
27-58	Your employee has good potential to be successful in telework, although s/he may need training, support and/or experience to overcome any personal or other barriers before starting to telework.
59-90	Your employee should be solidly successful in telework and his/her success is likely to increase over time as s/he gains experience and overcomes any personal barriers.

PART 3 Manager/Supervisor recommendation to attend telework training

- Recommend
- Do not recommend

If not recommended, please state reason:

 Manager/Supervisor Signature _____ Date

PART 4 Division Chief/Manager Review (if applicable)

In some departments the manager/supervisor's recommendation will need to be reviewed by a Division Chief or Manager before it is forwarded to the department director for approval.

Notes:

Division Chief/Manager Signature _____

Date _____

PART 4 Department Director Approval

Department Director's Approval: Approve
 Disapprove

If disapproved please state reason:

Department Director's Signature _____

Date _____

File:

Original- OHR

Copy- Manager/Supervisor, Employee

Montgomery County Interim Telework Program Program Policy

I. Purpose.

This policy provides implementation guidelines for operation of the Montgomery County Government's Interim Telework Program. The intent of the Program is to promote telework as a legitimate alternative for managers, supervisors, and employees, enable departments to remain functional during emergency shutdown, and improve the recruitment and retention of high quality employees through enhancements to employees' quality of life. This policy is subject to periodic review and revision and may be terminated at the County's discretion.

II. Background.

Increasing traffic congestion, advances in telecommunications, and changing social needs have increased the need for alternative work arrangements. In 2004 the Interagency Telework Program for County Agencies was established to create an operational plan for telework implementation and maintenance. Through this initiative County Human Resources directors will collaborate in an effort to meet the goal of 20% of eligible agency employees teleworking by the year 2005, as established by the Metropolitan Washington Council of Governments (COG).

Agencies participating in the Program include the Montgomery County Government, Montgomery County Public Schools (MCPS), the Maryland-National Capital Park and Planning Commission (M-NCPPC), Montgomery College, the Washington Suburban Sanitary Commission (WSSC), and the Housing Opportunities Commission (HOC).

III. Definitions.

Eligible Employees: Full-time and part-time *non-bargaining unit* employees in the Executive and Legislative branches of the County who are in a telework approved position, have successfully completed their probationary period and have a "successful" performance rating or better, or have performed at a successful level or better under an established performance plan for a minimum of six months are eligible to apply to telework.

Eligible Position: An occupational job class determined by a department head in conjunction with department managers and supervisors to be a **telework approved position**. Individuals in eligible positions may apply for, but are not guaranteed, the option to telework.

Episodic Telework: An employee teleworks on an irregular basis. These arrangements will accommodate a business cycle or projects amenable to being performed at home, rather than in an office setting.

Main Office: An location of the employee's primary County Government workspace and place where the employee normally performs work duties.

Regular Telework: The employee teleworks on a regularly scheduled basis. These arrangements will involve recurring tasks that occur on an ongoing basis.

Remote workplace or location: An employee's residence only.

Telework: Telework is defined as working from a remote work location or workplace instead of traveling to the main office. It is a work alternative available to eligible employees when it would benefit both the agency and the employee.

Telework Coordinator: An individual in the Office of Human Resources responsible for providing departments with technical assistance; maintaining telework records and reports; and gathering and analyzing data on the Telework Program.

Teleworker: A person who, for at least two days a month, works from their home to produce an agreed upon work product.

IV. Objectives

The objectives of the Telework Program are as follows:

- To further support the County's efforts in promoting the organization as an employer of choice.
- To support national and regional efforts to reduce traffic congestion.
- To provide employees with opportunities to enrich their lives by gaining quality time otherwise lost as a result of lengthy commutes through flexible work arrangements such as telework.
- To further enhance employee recruitment and retention efforts.
- To reduce absenteeism, sick leave, and late arrivals; and increase productivity.
- To improve emergency contingency plans.

V. Policy.

Eligibility. Full-time and part-time *non-bargaining unit* employees in the Executive and Legislative branches of the County who are in a telework approved position, have successfully completed their probationary period and have a "successful" performance rating or better, or have performed at a successful level or better under an established performance plan for a minimum of six months are eligible to apply to telework.

The department head in conjunction with department managers and supervisors will identify positions appropriate for telework based on:

- ability to maintain or improve service delivery to internal and external customers;
- the essential functions of the position and its ability to be performed off-site with only e-mail, VPN (virtual private network), and phone support;
- whether access to necessary reference materials is available through photocopying, faxing, or electronic transfer of documents;

- whether work performance for the position can be effectively measured in a telework arrangement;
- whether results and productivity can be effectively measured with limited supervisory observation; and
- whether proprietary and confidential information of the County department or division can be maintained as confidential.

An employee in a position eligible for telework is not required to telework and has the right to refuse to telework if the option is made available to them. Similarly, all telework requests are subject to recommendation by the manager or supervisor and approval by the Department Head.

A teleworking employee may be restricted from participating in other alternative work schedules.

An employee in the Office, Professional, and Technical (OPT) and Service, Labor and Trades (SLT) bargaining units represented by MCGEO/Local 1994 and employees in the police bargaining unit represented by the Fraternal Order of Police Lodge 35 and the firefighter bargaining unit represented by IAFF Local 1664 are *not eligible* for telework.

Duration of Interim Period. The interim period for the Telework Program will be for one full calendar year.

Participation. Telework is a voluntary cooperative arrangement between the County and the employee. An employee who participates in the Telework Program is subject to all County policies and procedures including, but not limited to, those regarding confidentiality; disclosure of information; conflict of interest; and acceptable use of County-owned information and communications technology resources.

Training. Training is mandatory for all eligible employees interested in participating in the Telework Program. The employee must attend the training with their manager or supervisor before completing the *Manager/Supervisor-Employee Telework Agreement*. The training will provide employees, managers, and supervisors with guidance on how to maximize the benefits of telework and will include information on the application process, teleworker roles and responsibilities, instructions on proper ergonomic positioning of furniture and tips on how to ensure the safety of the employee's home office.

Work space. An employee must designate and maintain a clean, safe workspace that is adequate for work and free of obstructions and distractions at the employee's residence.

An employee must not conduct meetings with customers or co-workers at the employee's residence. When a meeting is scheduled on a day the employee is scheduled to telework, the employee must go to the office to attend the meeting or make alternative arrangements.

An employee injured while working in the workspace designated for telework in the employee's residence should follow established County procedures for reporting on-the-job injuries. The County is not liable for injuries to third persons, family members or both in and around the employee's residence, except for injuries that result from an employee's conduct while the employee is acting within the scope of County employment (as long as the employee is not acting maliciously).

Telework Schedule and Availability. A telework schedule may include two or more days of work per month at an employee's residence. The number of days per week or month is a decision to be made by the manager or supervisor in conjunction with the employee. A telework

schedule, including specific days and hours, must be agreed upon by the manager or supervisor and the employee. This schedule must include a meal period and breaks. The amount of time an employee is expected to work per day or per pay period will not change due to participation in the telework program.

The manager or supervisor and employee must also agree on what should happen if an employee's scheduled telework day falls on a holiday or the employee uses leave on or before a scheduled telework day.

An employee *must* be available by phone, email or both during the scheduled telework hours, with the exception of the meal period and breaks. A teleworking employee may be required by the employee's manager or supervisor to come into the office on a scheduled telework day. The employee's manager or supervisor must make this requirement known to the employee prior to the employee's scheduled telework day. The employee must comply with this requirement. A supervisor, however, must not require an employee to come to the office at anytime during the employee's telework day.

An employee must not travel to a meeting (neither at the main office nor at another location) from the employee's residence at anytime during the employee's telework day.

The telework agreement may be suspended or the number of hours or days per week or month the employee teleworks may need to be revisited should main office coverage become a problem due to changes in work demands or office staffing.

An employee must not perform personal business or activities during designated telework hours. Personal business or activities include, but are not limited, to caring for dependents or making home repairs.

Work performance. An employee's job responsibilities will not change due to participation in the Telework Program. The manager or supervisor may require the employee to submit regular status reports to help judge work performance. A decline in work performance or a decline in service to the employee's internal and external customers may result in termination from the Telework Program.

A teleworking employee will be held to the same performance evaluation standards as other employees in the County.

Overtime, Leave and Compensation. An employee must continue to follow the County's work schedules, attendance, and hours of work standards, and adhere to the employee's approved work schedule, including work hours, while teleworking. If an employee becomes sick at any time while teleworking, the employee is required to immediately report the sickness to the employee's manager or supervisor and use sick leave to cover those hours not worked. If an employee must take some other form of leave, the employee is required to request leave from the employee's manager or supervisor immediately and use the leave to cover those hours not worked.

An employee who is "non-exempt" for FLSA purposes must get advanced manager or supervisory approval before performing overtime work. FLSA-exempt executive, administrative, and professional employees who are paid on a salary basis will not be required to keep track of their working hours during a work day, and these FLSA-exempt County employees will not be eligible to receive overtime pay.

An employee's compensation and benefits will not change due to participation in the Telework Program.

An employee must submit bi-weekly time sheets in accordance with the normal schedule.

Inclement weather. During a general emergency in which the main office is closed, a non-essential employee scheduled to telework will not be required to work remotely.

During a liberal leave period a non-essential employee scheduled to telework must work remotely during that period. If the employee chooses not to work remotely on a scheduled telework day during a liberal leave period, the employee must notify the employee's manager or supervisor of the employee's leave status and use annual leave to cover those hours not worked.

Code Red Air Quality Days. On days when the air quality in the Washington metropolitan area is considered unhealthful, the Washington Council of Governments (COG) declares a "Code Red Air Quality Day." On these days, the public is encouraged to take actions which limit ozone-providing gases. An employee approved to participate in the telework program is strongly encouraged to telework during a Code Red Day.

In order to facilitate telework, the Department of Environmental Protection (DEP) will send an alert to all eligible County employees and their supervisors by 4:00 pm of the day before a Code Red Day. Employees can also check the web site www.air-watch.net, managed by COG, which posts the air quality index and any alerts for the following day. Telework employees are encouraged to discuss their ability to telework the subsequent day (if it has been identified as a Code Red Day) with their supervisor. If the supervisor approves, the employee should telework that day.

Equipment. An employee is responsible for the purchase, installation, and maintenance of all equipment (e.g. computer, desk, printer, telephone, , etc.) used for telework at an employee's residence. The employee is responsible for ensuring that the chair used is fully adjustable with lumbar support and that the workstation is properly adjusted (i.e. ergonomically).

An employee must have a phone at the remote workplace, and may be required by their manager or supervisor to check voice mail messages on a regular basis.

Supplies. An employee may take supplies needed for work at the telework location from the employee's main office with supervisory approval. The employee will not be reimbursed for out-of-pocket expenses for supplies regularly available at the main office.

Confidentiality. An employee is responsible for protecting the security and integrity of data, information, and paper files used when teleworking.

Data collection. An employee and the employee's manager or supervisor must, at the County's direction, participate in studies, inquiries, reports, or analyses relating to telework.

VI. Procedure.

Application Procedure. An employee who is eligible to *apply* to the Telework Program (please see the section on "Eligibility") must complete the Telework Program application process detailed in *10 Steps to Telework* to determine if they are eligible to *participate* in the Program.

Approval. If the manager or supervisor and employee agree on a mutually beneficial telework arrangement, the manager or supervisor must forward a copy of the *Manager/Supervisor-Employee Telework Agreement* to the department director for approval. If the manager or supervisor and employee do not agree on a mutually beneficial telework arrangement, the manager or supervisor must forward a copy of the agreement, with a summary of the points on

which the manager or supervisor and employee agreed and disagreed attached to the agreement, to the department director. The department director must review the materials provided and approve or disapprove the employee to telework; or make suggestions on the points the manager or supervisor and the employee disagree on to help them reach an agreement on a telework arrangement. If the employee is not approved for telework, the department director must give the employee the reason for disapproval. The department director's decision is final.

Renewal. If the Telework Program continues beyond the year long interim period an employee, in conjunction with the employee's manager or supervisor, will be required to complete renewal paperwork annually. An employee and the employee's manager or supervisor will be required to complete the *Telework Renewal Request* form and the employee must complete the *Information for Data Collection* form. The *Telework Location & Schedule* and the *Workspace Self-Certification Checklist and Safety Guidelines for the Telework location* form must also be completed if the employee's telework location and or schedule have changed.

Change in status. An employee will be required to complete a new set of application materials if the employee's job and manager or supervisor changes. The employee must first check the eligible list to make sure the job is an approved telework position. The employee must then perform at a successful level under an established performance plan for a minimum of six months before completing a new set of application materials. If the employee is approved to telework, the agreement under the employee's former job and manager or supervisor will be terminated and replaced by a new approved agreement.

If an employee's manager or supervisor changes but the employee's job does not, the employee must share the telework agreement packet with the employee's new manager or supervisor. It is at the discretion of the manager or supervisor to continue or terminate the telework agreement.

If an employee's job changes but the employee's manager or supervisor does not, the employee must first check the eligible list to make sure the job is an approved telework position. If the job is eligible, the employee will not be required to complete a new set of application materials if their job changes but their manager or supervisor does not. It is at the discretion of the manager or supervisor to continue or terminate the telework agreement.

Termination. Telework is not a formal, universal employee benefit but an alternative method of meeting the needs of the County. Since telework is a privilege, departments have the right to refuse to make telework available to an employee and to terminate a telework arrangement at the discretion of management with or without cause and with notice to the employee. A teleworking employee has the right to terminate a telework arrangement with or without cause and with notice to the employee's manager or supervisor.

If termination is initiated by the manager or supervisor, the manager or supervisor must give the employee 10 working days prior notice. If initiated by the employee, the employee must give the manager or supervisor 5 working days prior notice. The *Notice to Terminate Telework Agreement* form must be completed and signed by both the manager or supervisor and employee regardless of who initiates the termination. The form must then be forwarded to the department director for review. Upon termination of the Agreement, the employee will return to a traditional work arrangement. The employee will be responsible for returning all County-owned supplies and work products no later than 10 business days from the date the termination is approved by the department director.

An employee may apply to participate in the Telework Program again after their telework agreement has been terminated. The length of time an employee must wait before applying to the program again is at the discretion of the employee's manager or supervisor.

VII. Responsibilities.

Employee.

Follow the provisions in the *Montgomery County Telework Program Policy*.

Work with their manager or supervisor to come to an agreement on a mutually beneficial telework arrangement, and observe the terms and conditions of, the agreement.

Follow all applicable laws, rules, regulations, policies and procedures to ensure the security and confidentiality of official documents and records.

Manager and Supervisor.

Encourage active communication via e-mail, voice mail, and telephone between teleworkers and main office staff to ensure adequate interaction.

Ensure, through an equitable distribution of workloads, that telework does not burden main office staff.

Periodically evaluate the effectiveness of the telework arrangement.

Encourage employees to telework during code red air quality days.

Department Director.

Periodically evaluate the effectiveness of telework in the department by meeting with managers or supervisors managing teleworking employees.

Department of Technology Services

Accept and process requests for VPN access.

Provide employees using a County-owned laptop with technical support via the IT Helpdesk.

Departmental IT Personnel

Review and confirm employee request for Telework based on computer knowledge and capability. (draft language)

Risk Management

Provide training on proper ergonomic positioning of office furniture and tips on office safety.

Office of Human Resources.

Designate a telework coordinator to serve as the lead administrator of the Telework Program.

Provide employees and managers or supervisors with technical assistance.

Coordinate the training of employees eligible to telework, and the training of managers or supervisors who have eligible employees.

Maintain and update the Montgomery County Telework Program policies and guidelines and application and promotional materials.

Provide the Management and Fiscal Policy Committee with information on the status of telework in the Montgomery County Government on an ongoing basis.

VIII. Program evaluation and outcome measures.

An employee and an employee's manager or supervisor must participate in all studies, inquiries, and analyses of the Telework Program. Data compiled may be made available to the general public, organizations, businesses, and the press.

Evaluation and outcome measurements. Under the guidelines set by the Interagency Telework Program for County Agencies, the County must collect the following information annually from each teleworker, using a uniform questionnaire:

- Name, title, department, etc.;
- Worksite location(s) on non-telework days;
- Number of miles between employee's home and main office;
- Means of transportation on non-telework days;
- Usual commute routes on non-telework days;
- Address of telework site;
- Number of days employee is scheduled to telework per month; and

Based on the information collected above, the County must report the following information to the Management and Fiscal Policy Committee on an ongoing basis:

- Number of employees in positions eligible to telework;
- Number of active teleworkers;
- The average number of days employees are scheduled to telework per month;
- Total number of days employees teleworked overall;
- Average number of miles traveled between teleworker's homes and main office on non-telework days;
- Means of transportation on non-telework days and
- Top ten commuter routes typically traveled by teleworkers on non-telework days.

WORKSPACE SELF-CERTIFICATION CHECKLIST AND SAFETY GUIDELINES FOR THE TELEWORK LOCATION

Instructions: This checklist is designed to assess the overall safety of the workspace you have designated for telework in your home and to ensure that you are prepared for teleworking. The safety guidelines are to provide you with information to assist you with the maintenance of your telework location.

Note: Click on the shaded boxes and enter the requested data; the boxes will automatically expand. Double click the gray boxes and select "checked."

Employee Name: Position Title:

Manager or Supervisor Name:

Department: Division:

Remote Office Address:

Remote Office Phone:

PART 1 Work Space Environment

Please check all that apply:

- The work space is free of potential hazards that could cause physical harm (frayed wires, bare conductors, loose wires, exposed wires to the ceiling, frayed or torn carpeting seams, uneven floor surfaces).
- The electrical outlets are grounded (3 pronged).
- The furniture being used (i.e. desk, file cabinets, shelves, bookcases) is sturdy and adequate for use.
- The rungs and legs of the chair are sturdy and free of loose casters (wheels).
- The phone lines, electrical cords, and extension wires are secured.
- The office space is neat, clean, and free of obstructions and excessive amounts of combustibles.
- There is enough light for reading.
- A fire extinguisher is easily accessible from the office space.
- There is a working smoke detector within hearing distance of the workspace.
- The area is free from distractions (i.e. children, pets, etc).

PART 2 Safety Guidelines

You should use the following recommended guidelines to assist you in a survey of the overall safety and adequacy of your remote worksite. The following recommendations do not encompass every situation that may be encountered. You are encouraged to obtain professional assistance with issues concerning appropriate electrical service and circuit capacity for residential worksites.

1. Develop and practice a fire evacuation plan for use in the event of an emergency.
 2. Check your smoke detectors regularly and replace batteries as recommended.
 3. Always have a working fire extinguisher at your telework location and check the charge as recommended.
 4. Computers are heavy. Always place them on sturdy, level, well maintained furniture.
 5. Take the following into consideration when locating your computer:
 - Place the monitor where there will not be any noticeable glare from windows or lighting.
 - Place the monitor at a comfortable height for viewing.
 - Locate the computer keyboard and mouse at a height that does not cause wrist strain.
 - Use a surge protector and make sure all cables are grounded.
 6. Always power down computers after the workday is over and always turn off all electrical equipment during thunderstorms.
 7. Choose office chairs that provide good supporting backrests and allow adjustments to fit you comfortably.
 8. Locate computers, phones and other electrical equipment in a manner that keeps power cords out of walkways.
 9. Keep your work area clean and avoid clutter, which can cause fire and tripping hazards.
-

PART 3 Certifications

I certify that all information contained in this checklist is true and complete to the best of my knowledge. I understand that any erroneous, misleading or fraudulent information is sufficient grounds for my preclusion from teleworking. I have read the safety guidelines for the telework location.

Employee

Date

File:

Original- OHR

Copy- Manager/Supervisor, Employee

TECHNOLOGY REQUIREMENTS

Instructions: Use this worksheet to assess your technology needs.

Required

- Computer with Internet access
- Phone
- Must be computer Savvy (Capable of resolving own computer problem with minimum or no help)

Optional

- VPN

The following equipment and software requirements must be met in order to apply for VPN access:

- (1) Computer (any one of these is acceptable)
 - County Primary PC or Laptop
 - County Secondary PC or Laptop
 - Personal PC or Laptop
- (2) Operating System (all of these are required)
 - Windows 98, ME, 2000 or XP
 - 300 MHz Pentium (minimum)
 - 64 MB memory (minimum)
 - 10 MB free disk space (minimum)
 - Internet Browser (Internet Explorer Version 6.0 or better)
- (3) Internet Service (any one of these is acceptable)
 - Cable Modem
 - DSL
 - ISDN
 - T1 or higher

(dial-up is not permitted for VPN access)
- (4) Virus/Spyware protection (any one of these is acceptable)
 - Symantec AntiVirus Spybot
 - McAfee Adaware
 - TrendMicro Other SpyWare:
 - Other AV:

Montgomery County TELEWORK AGREEMENT AND DISCLOSURE OF BINDING TERMS

Scope of Agreement

This Agreement is by and between the Montgomery County Department of _____ (Department Name) and _____ (Employee Name), the employee.

Teleworking is available only to *eligible employees*, at the County's sole discretion. Teleworking is not an employee benefit intended to be available to the entire organization. As such, no employee is entitled to, or guaranteed the opportunity to telework.

Employees participating in the Telework Program agree to abide by the Telework Program Policy and understand that the Telework Program, or an employee's participation in the program, may be terminated by the County, with or without cause.

Other than those different duties and obligations expressly imposed on the Employee under this Agreement, the duties, obligations, responsibilities and conditions of Employee's employment with the County remain unchanged where the employee participates in the Telework Program.

The terms "*remote work location*" or "*remote workplace*" mean the Employee's residence. The term "*main office*" for the purpose of this agreement means the Employee's usual and customary County work address.

This agreement will be construed, interpreted, and enforced according to the laws of the State of Maryland.

Term of Agreement

The duration of the Telework Program will cover an interim period of one full calendar year. This Agreement will begin _____ and end _____.

Please initial each item to indicate that you have read and understand the conditions of the County's Telework Program:

1.1 Termination of Agreement

I understand that my participation in the Telework Program has been determined through a selection process in which I voluntarily completed and submitted application materials to participate in the Program.

I understand there is no right to telework and that the County has the right to terminate the Program or this *Telework Agreement as per the Telework Policy*, with or without cause, upon reasonable notice. I understand the County will not be held responsible for costs, damages or losses resulting from cessation of my participation as a teleworker.

I understand that I may request withdrawal from the Telework Program with or without cause, upon reasonable notice to my employer.

I understand that this Agreement is not a contract of employment and may not be construed as one.

1.2 Overtime, Compensation and Leave

I agree to obtain *advance managerial or supervisory approval* before performing overtime work (if applicable) or before taking leave. Working overtime without such approval may result in termination from the Telework Program, other appropriate action or both.

I understand that my compensation and benefits will not change due to participation in the Telework Program.

1.3 Work Schedule and Work Status

I understand that my telework schedule will be as designated in the *Telework Location and Schedule* form. Any changes to my work schedule record must be agreed to by my manager or supervisor and approved by the Department Director in advance.

I agree to maintain regular contact with the office and my manager or supervisor on telework days as established in the *Manager/Supervisor-Employee Telework Agreement*.

I understand that my manager or supervisor may require me to report to the main office on otherwise scheduled telework days, with advanced warning.

I understand that I must not travel to a meeting (neither at the main office or at another location) from the my residence at anytime during my telework day.

1.4 Work Performance

I agree to perform the duties as provided in the approved *Manager/Supervisor-Employee Telework Agreement*. I agree to provide regular status reports as required by my manager or supervisor to help judge work performance. I understand that a decline in work performance or a decline in service to my internal or external customers may result in my termination from the Telework Program.

1.5 Standards of Conduct

I understand that I am bound by all County regulations, policies, and procedures while working at the remote workplace. Violation of the foregoing may result in my termination from the Telework Program.

1.6 Equipment

I agree to be responsible for the purchase, installation and maintenance of all equipment (e.g. computer, desk, printer, telephone, etc) at my expense, that will be used for telework in the designated telework workspace at my residence..

1.7 Supplies

I agree to obtain all supplies needed for work at the telework location from my main office supply source with manager or supervisory approval, and I understand that out-of-pocket expenses for supplies regularly available at the main office will not be reimbursed.

1.8 Work Space

I agree to designate a specific work space in my residence for use for telework that is adequate for the performance of my official duties. I agree to maintain the work space in a safe condition, free from hazards and other dangers to me, as provided in the Telework Program Policy..

I agree to perform only official duties and not to conduct personal business while on work status at the remote work location. Personal business includes, but is not limited, to caring for dependents or making home repairs.

I agree to refrain from conducting any on-site work-related meetings at the remote work location.

1.9 Reimbursement

I understand the County will not reimburse me for any expenses I incur (whether for equipment or supplies) to implement this Agreement. I agree that the County will not be responsible for operating costs, home maintenance, or any other incidental cost (e.g. utilities, insurance) whatsoever, associated with the use of my residence.

I understand that the County will reimburse me for expenses authorized by my manager or supervisor and incurred while conducting business for the County (except for supplies that are regularly available at the main office); and that all expenses must be approved by my manager or supervisor in advance.

1.10 Liability for Injuries

I understand that I am covered under the Maryland Workers' Compensation law if injured in the course of actually performing official duties at the main office or at the remote workplace. I agree to notify my manager or supervisor immediately of any accident or injury that occurs at the remote workplace and to complete any required forms. All claims will be handled according to the normal procedures for reporting and documenting Worker's Compensation claims. The County agrees to investigate such a report immediately.

I understand that the County is not liable for damages to my personal or real property while I am working at the remote work location, except to the extent that the County is adjudicated liable under Maryland Law.

I understand that I remain liable for injuries to third persons, family members or both on my private premises, except for injuries that result from my own conduct while I am acting within the scope of County employment (as long as I am not acting maliciously).

1.11 Security of Confidential Information

I agree to comply with all County policies and instructions regarding the maintenance of the security of confidential information. I agree to protect County records from unauthorized disclosure or damage and will comply with all policy directives governing the disclosure of County information.

1.12 Data Collection

I agree to participate in all studies, inquiries, reports, or analyses relating to telework for the County. I understand that data compiled may be made available to the general public, organizations, businesses, and the press.

1.13 Training

I understand that I must attend training with my manager or supervisor before I begin teleworking.

1.14 Other Actions

I understand that nothing in this agreement precludes the County from taking any appropriate disciplinary or adverse action against me if I fail to comply with the provisions of this agreement.

Signature

I affirm by my signature below that I have been given copies of the following documents that present the County's policy regarding telework: Telework Program Policy, Telework Agreement and Disclosure, Manager/Supervisor-Employee Telework Agreement, Workspace Self-Certification Checklist and Safety Guidelines for the Telework Location, and Teleworker Work Location and Schedule. I acknowledge that I have, before entering into this Agreement, read the policy documents identified above. I further acknowledge that I fully understand the content of these policy documents, and am fully aware that these documents set forth the policies under which the County operates the telework program.

Employee Signature

Date

File:

Original- OHR

Copy- Manager/Supervisor, Employee



OFFICES OF THE COUNTY EXECUTIVE
ROCKVILLE, MARYLAND 20850

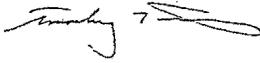
Isiah Leggett
County Executive

Timothy L. Firestine
Chief Administrative Officer

MEMORANDUM

September 10, 2008

TO: Executive Branch Department Directors

FROM: Timothy L. Firestine, Chief Administrative Officer 

SUBJECT: Alternative Work Schedules

Over the last several months, a number of employers in both the private and public sectors have considered alternate work schedules as a means to lower energy consumption and to help employees reduce their fuel costs and commuting time. Our current policies, procedures, and applicable collective bargaining agreement provide us the ability to offer alternate work schedules to our employees. The County Executive and I are encouraging you and your management team to explore the four-day work week (10-hour day) for employees in your departments. The County has worked in collaboration with MCGEO to encourage participation in these voluntary opportunities.

The benefits of AWS for the County and our employees are many: reducing fuel consumption and costs, easing traffic congestion, and helping us meet our regional goal with the Metropolitan Washington Council of Governments of 30 percent of employees participating in alternate work schedules. Although the County is not limited in the options that it offers to employees who express interest in this program, we believe that the four 10-hour day work week provides the most flexibility in scheduling employees to be out of the office.

We are asking management to aggressively examine operational requirements, and identify positions where voluntary four 10-hour day workweeks may be offered to employees and to develop an operational plan consistent with providing quality customer service. We do understand the challenges of maintaining service delivery and managing flexible work schedules. However, we believe these challenges can be overcome.

The following criteria will assist you in your operational review and discussions with supervisors and managerial staff:





OFFICES OF THE COUNTY EXECUTIVE
ROCKVILLE, MARYLAND 20850

Isiah Leggett
County Executive

Timothy L. Firestine
Chief Administrative Officer

- Service delivery to internal and external customers will be maintained;
- Operational requirements must be met;
- Employee participation is voluntary;
- Offices or operations must be covered during normal period of public service five days a week;
- Success must be measured in relation to departmental headline performance measures; and
- Costs to the County will not be increased.

In order to assist you in the development of an implementation plan, the Office of Human Resources will conduct a management informational session on September 26th and September 30th, from 2:00 to 3:30 p.m. in the EOB Lobby.¹ Further, you are strongly encouraged to contact your assigned human resources specialist on the labor/employee relations team as soon as possible in order to involve MCGEO in the discussion of how such opportunities shall be offered to eligible employees within your department.

Please submit an implementation plan to the Office of Human Resources by October 3, 2008. Your plan should assume a 12-month time span and must include a description of how success will be measured through utilization of departmental headline performance measures. At the end of the 12-month period we will reevaluate the program to determine if any changes are necessary. Attached are two documents to aid in the development of your plan and an instrument for measuring the environmental impact of the plan. Following a collaborative review process to ensure plan compliance with the guidelines and utilization of as many opportunities for four 10-hour day schedules as possible, the department's implementation plan will be forwarded to the CAO. Once approved by the CAO, the Office of Human Resources will provide managers guidance and next steps to implement alternate work schedules.

TF:ab

Attachments

¹ Sept. 26, 2008 class id #08000
Sept. 30, 2008 class id #08001



DATA COLLECTION FOR ALTERNATE WORK SCHEDULES

Instructions: To track progress and to properly address the needs of management and employees participating in the Alternate Work schedule; the Office of Human Resources will collect data and periodically conduct evaluations. Please complete the questions below.

Employee Name

Position Title

Department / Division

1. What are your primary job responsibilities?
2. Are you responsible for providing direct service to customers? Yes No
 - a) If yes, what effect of service delivery to your customers do you anticipate? (please describe)
3. Are you responsible for supervising or supporting staff that provide direct services to customers? Yes No
4. What benefits do you expect to gain from an alternate work schedule? (please check all that apply)
 - Reduce time spent commuting to and from my primary office.
 - Increase productivity by working in a quieter work environment
 - Improve work-life balance
 - Other (please describe)
5. What benefits do you expect your department to gain from your alternate work schedule? (please list)
6. What is the one-way distance from your home the work? _____ miles
7. What time do you typically leave home to get to your place of work? _____ min/hr
8. What time do you typically leave work to go home? _____ min/hr
9. How long is your commute on average:
 - From home to work? _____ hrs _____ mins
 - From work to home? _____ hrs _____ mins
10. What is your primary mode of travel to and from work?
 - Drive alone Car or Van Pool Public Transportation
 - Walk or Bike Other (please describe) _____
11. What is your primary commute route?
 - Beltway Route 355 Route 28
 - Other (please describe) _____

Alternate Work Schedules Informational Session

September 26, 2008

Montgomery County
Office of Human Resources

Overview

- County Executive Initiative: Promote "4-10" work week
- Implementation plan due to OHR: October 3, 2008
- Meet with MCGEO if necessary
- CAO will review and authorize for departments

Benefits of Alternate Work Schedules

- Increased morale
- Potential for expanded hours of service delivery
- Helps County meet the Metropolitan Washington Council of Governments (COG) regional goal of 30% of employees participating in alternate work schedules
- Potential economic savings to County: energy/utilities, demand for parking/work spaces

Points to Consider

- Service delivery not affected
- Voluntary for all interested employees
- Eligible Employees: all non-probationary
- Can be implemented by:
 - Department
 - Division
 - Facility
 - Work Unit
 - Job Classification

Points to Consider: Staff Coverage

- Potential days off for employees throughout the work week
 - not isolated to Monday or Friday
- Days off for employees must be staggered to allow for consistent staff coverage throughout the week
- Back-up coverage will have to be maintained

Points to Consider: Effects on Leave

- Timesheet adjustments
- Sick/Annual/Personal leave taken on normal work day: 10 Hours
- Holidays

Next Steps:

Implementation Planning

- Conduct business and staffing assessment considering department headline measures
- Plan for back-up service delivery
- Survey employees to gauge interest
- Determine selection criteria for interested employees
- Consult with OHR
- Draft implementation plan with employee listing and days off planned

Questions?

- Communicate with OHR Labor/
Employee Relations Representative if
you have any additional questions.

T&E COMMITTEE #3,3.1,4,5
April 29, 2009

Worksession

MEMORANDUM

April 28, 2009

TO: Transportation, Infrastructure, Energy & Environment Committee

FROM:  Keith Levchenko, Senior Legislative Analyst

SUBJECT: **Worksession: FY10 Operating Budget and CIP Amendments:**

- #3: CIP Amendment: Energy Conservation: MCG
- #3.1 CIP Amendments: Conservation of Natural Resources
- #4: Department of Environmental Protection Water Quality Protection Fund
- #5: Non-Departmental Account (NDA) – Climate Change Implementation

Councilmembers should refer to packets from the T&E worksession of April 22 for background information on the Department of Environmental Protection Budget and the Climate Change Implementation Non-Departmental Account.

Those expected for this worksession:

DEP Director Robert Hoyt
Stan Edwards, Chief of Environmental Policy and Compliance
Steve Shofar, Chief of Watershed Management
Gladys Balderrama, Manager, Administrative Services (DEP)
John Greiner, Office of Management and Budget

CIP Amendments from March

On March 19, 2009 the County Executive transmitted a package of CIP amendments and adjustments. Several of these amendments are presented below.

Facility Planning: Storm Drains (Amendment PDF on ©1)

The Executive recommends reducing current revenue-funded expenditures by \$25,000 in FY10 (from \$250,000 to \$225,000) in order to provide additional fiscal capacity in the Operating Budget. The decrease will reduce the level of effort in the project slightly. However, the program is driven by storm drainage assistance requests which fluctuate from year to year often

based on weather conditions (the more rainfall, the more requests received). **Council Staff concurs with the reduction.**

Facility Planning: Stormwater Management (Amendment PDF on ©2)

The Executive recommends reducing current revenue-funded expenditures by \$42,000 in FY10 (from \$425,000 to \$383,000) in order to provide additional fiscal capacity. The decrease will result in slightly less planning work for low impact development projects. However, given the tight fiscal situation with current revenue, **Council Staff concurs with this modest reduction.**

Energy Conservation: MCG (Amendment PDF on ©3)

On March 19, 2009 the County Executive transmitted a package of CIP amendments and adjustments. Included in this package was an amendment to switch \$60,000 of current revenue funded expenditures in FY09 to bonds. OMB staff verified that the intended expenditures qualify for bond funding. **Council Staff concurs with this change.**

Water Quality Protection Fund

At the worksession on April 22 the Committee expressed support for the Water Quality Protection Fund (WQPF) budget of the Department of Environmental Protection (DEP) but with a couple of changes as noted here.

Add funding of a storm drain inventory of MCPS facilities as required by the new National Pollution discharge Elimination System (NPDES) permit.

At the April 22 meeting, DEP staff noted that there may be sufficient surplus funds in the WQPF in FY09 to accommodate this item without requiring an increase in the WQPC for FY10. DEP was in the process of completing its 3rd Quarter Analysis with OMB and that the availability of FY09 dollars could be confirmed shortly.

Council Staff suggests that OMB update the Committee on April 29 as to the availability of FY09 dollars in the WQPF. If these dollars are available, then no FY10 action may be required in order for the storm drain inventory of MCPS facilities to proceed. NOTE: At the April 22 meeting, a cost of \$80,000 for the survey was noted. The latest DEP estimate is \$90,000.

Defer increases in Water Quality Protection Charge (WQPC) assessments to the Montgomery Village Foundation (and other entities in similar circumstances) for FY10.

At the April 22 meeting, the Committee discussed concerns raised by the Montgomery Village Foundation regarding how its WQPC is assessed. The Foundation believes the assessment of foundation-owned roads (which are publicly used) should be reconsidered or the method by which the charge is assessed should be modified so that homeowners are assessed

directly for these common areas rather than the Foundation which cannot easily pass these costs on to its homeowners.

At the April 22 meeting, the Committee expressed support for changes in legislation and/or regulations that would address these concerns and asked Council and Executive staff to work to implement appropriate changes in a timely manner. Pending these changes, the Committee suggested that DEP defer the phase-in of costs to the Montgomery Village Foundation that were assumed for FY10. The Committee asked DEP for an estimate of the impact of this deferral on the Water Quality Protection Fund.

DEP Staff are developing a precise estimate for delaying the phase-in and will be available to discuss this issue on April 29. However, the long-term impacts on the fund will ultimately depend on what changes are made to County law or regulation.

Non-Departmental Account (NDA) – Climate Change Implementation
(Recommended FY10 Operating Budget Excerpt Attached on ©4)

Table 1:
Climate Change Implementation NDA Expenditures

Item	Approved FY09	Estimate FY09	CE FY10	T&E FY10
Clean Energy Rewards Program	561,000	561,000	518,000	518,000
Implementation of Sustainability Working Group Recommendations	-	-	50,000	50,000
Tank Cleaning and Filter Costs to Ready Fleet for B-20 Fuel	47,800	9,800	24,000	24,000
Energy Audits and Energy Performance Contracting for County Buildings	666,050	666,050	-	-
Climate Protection Plan Consultant Assistance	104,170	104,170	-	-
Consumer Protection Consultant Assistance to work with MD/Fed Govt	50,000	25,000	-	50,000
Implementation of Telecommuting Action Plan				
- P/T OHR Specialist to Manage Telecommuters	34,480	34,480	34,760	Defer
- Equipment	97,500	-	97,500	Defer*
Totals	1,561,000	1,400,500	724,260	642,000

*T&E recommended shifting \$50,000 from the telecommuting dollars to fund Consumer Protection consultant assistance in FY10.

As shown in the chart above, the T&E Committee supports the Executive's recommendations regarding the Clean Energy Rewards Program, Sustainability Working Group dollars, and additional tank cleaning and filter costs to ready the fleet for B-20 fuel.

The Committee recommended shifting \$50,000 from the Executive's recommended telecommuting dollars in FY10 to provide continued consultant assistance in the Office of Consumer Protection. This support is needed so that the Office can effectively advocate for issues of concern to Montgomery County residents with regard to State and Federal energy

regulations (consistent with the intent of Bill 35-07, Consumer Protection – Energy and Environmental Advocacy approved last year).

Implementation of Telecommuting Action Plan

The Committee deferred action on the telecommuting funding (except for the \$50,000 shift noted above) but expressed concern with regard to the cost and direction of the effort and the lack of a detailed action plan as called for in Bill 29-07, Environmental Sustainability – Climate Protection – Motor Vehicles rates.

Subsequent to the April 22 meeting, Council Staff has worked to identify any telecommuting discussions that have already occurred at the Council (via the MFP Committee) and whether this review sufficiently addresses the questions raised by Council Staff on April 22 (see packet excerpt on ©5-6).

On October 27, 2008 the MFP Committee received an update on the Interagency Telework Initiative. This initiative stems from a Council resolution approved in September 2004 which called for an interagency operational telework plan and regular process updates. The next update is scheduled for June. The October update included the results of an employee survey (see ©7) showing that 38 County employees had formal telework arrangements in place. This number was dwarfed by the number of employees working compressed days (715), 4-10 hour day workweeks (1,127; including 829 policy officers), and flex-time (331) and was even lower than the number of employees working 12 hour workdays (45).

Apart from some discussion of teleworking in the context of these other initiatives (such as the 4x10 workweek) no comprehensive plan specific to telework has been developed. Bill 29-07 places the responsibility for the development of this plan with the Sustainability Working Group (SWG). However, this Group's first focus was the creation of a Climate Protection Plan by January 15, 2009. Now that the Climate Protection Plan is out, perhaps the SWG can revisit the telecommuting issue and work (with OHR assistance) on a telecommuting plan that meets the requirements of Bill 29-07.

However, with no comprehensive telecommuting action plan in place, and concerns regarding how the recommended FY10 telecommuting dollars would be spent (see packet excerpt on ©5-6) **Council Staff continues to recommend that no additional dollars for equipment be spent in FY09 or approved for FY10 until a comprehensive telecommuting action plan is developed and discussed by the Council and the issues associated with it are addressed. The OHR position, approved but not yet filled in FY09, should remain vacant and the associated dollars not spent until this discussion can take place."**

Moving Departmental Expenditures Out of the NDA

The NDA was approved late in the budget process last year with funding that was identified through increases approved in fuel/energy taxes that raised approximately \$11.1 million in additional revenue. Most of the new revenue generated was used to temper increases in property tax rates. However, a portion of the increased revenue was also used to fund

elements of this NDA (including \$1.0 million for climate change related initiatives and \$200,000 in increased funding for the Clean Energy Rewards Program).

However, an alternative to this approach would be to fund some or all of these items directly out of department budgets. Council Staff can attest to the difficulty in reviewing an NDA with multiple departmental leads. The T&E Committee had a difficult time assessing these issues as well this year. If the items were placed directly in department budgets, then the Council Committee that knows the department budget best would be responsible for the review.

The tradeoff to allocating this work to departmental budgets is that the expenditures would not be as prominently earmarked for a particular effort and departments would have flexibility during the year to reallocate or transfer resources to other accounts. However, the T&E Committee can seek briefings from departments during the year on issues of interest in order to keep abreast of what is happening.

Council Staff recommends moving all of the dollars out of the NDA to the respective departments with the exception of the Clean Energy Rewards dollars. The Council specifically approves this dollar amount via text in the County Government Appropriation Resolution and the intent is that these dollars will be available for this purpose and not available for reallocation to or supplement from the rest of DEP's budget. From this perspective, keeping these dollars in the NDA makes sense. If this is the only item to remain in the NDA, then the NDA name should be changed to "Clean Energy Rewards."

Attachments

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Facility Planning: Storm Drains -- No. 508180

Category
Subcategory
Administering Agency
Planning Area

Conservation of Natural Resources
Storm Drains
Transportation
Countywide

Date Last Modified
Required Adequate Public Facility
Relocation Impact
Status

March 18, 2009
No
None
On-going

EXPENDITURE SCHEDULE (\$000)

Cost Element	Total	Thru FY08	Rem. FY08	Total 6 Years	FY09	FY10	FY11	FY12	FY13	FY14	Beyond 6 Years
Planning, Design, and Supervision	4,705	3,222	8	1,475	250	225	250	250	250	250	0
Land	119	119	0	0	0	0	0	0	0	0	0
Site Improvements and Utilities	0	0	0	0	0	0	0	0	0	0	0
Construction	32	32	0	0	0	0	0	0	0	0	0
Other	3	2	1	0	0	0	0	0	0	0	0
Total	4,859	3,375	9	1,475	250	225	250	250	250	250	0

FUNDING SCHEDULE (\$000)

Current Revenue: General	4,758	3,274	9	1,475	250	225	250	250	250	250	0
G.O. Bonds	101	101	0	0	0	0	0	0	0	0	0
Total	4,859	3,375	9	1,475	250	225	250	250	250	250	0

DESCRIPTION

This project provides for the investigation and analysis of various storm drainage assistance requests initiated by private citizens and public agencies. These requests are related to the design, construction, and operation of public drainage facilities where flooding and erosion occur. This project includes expenditures for the preliminary and final design and land acquisition for storm drain projects prior to inclusion in the Storm Drain General project, or as a stand-alone project in the CIP. Prior to its inclusion in the CIP, the Department of Transportation (DOT) will conduct a feasibility study to determine the general and specific features required for the project. Candidate projects currently are evaluated from the "Drainage Assistance Request" list. As part of the facility planning process, DOT considers citizen and public agency requests and undertakes a comprehensive analysis of storm drainage issues and problems being experienced in the County. This analysis is used to select areas where a comprehensive long-term plan for the remediation of a problem may be required. No construction activities are performed in this project. When a design is 35 percent complete, an evaluation is performed to determine if right-of-way is needed. Based on the need for right-of-way, the project may proceed to final design and the preparation of right-of-way plats under this project. The cost of right-of-way acquisition will be charged to the Advanced Land Acquisition Revolving Fund (ALARF). When designs are complete, projects with a construction cost under \$500,000 will be constructed in the Storm Drain General project. Projects with a construction cost over \$500,000 will be constructed in stand-alone projects.

CAPACITY

Projects will be designed to accommodate the ten-year storm frequency interval.

COST CHANGE

Reduce funding and expenditures for fiscal capacity in FY10.

JUSTIFICATION

Evaluation, justification, and cost-benefit analysis are completed by DOT as necessary. In the case of participation projects, the preparation of drainage studies and preliminary plans will be prepared by the requestor's engineer and reviewed by DOT.

OTHER

Before being added as a sub-project, concept studies are evaluated based on the following factors: public safety, damage to private property, frequency of event, damage to public right-of-way, environmental factors such as erosion, general public benefit, availability of right-of-way and 5:1 benefit cost ratio. In the case of public safety or severe damage to private property, the 5:1 benefit (damage prevented) cost ratio can be waived. Drainage assistance requests are evaluated on a continuing basis in response to public requests. DOT maintains a database of complaints.

Construction Projects Completed: Brookville Rd., Thomlinson Ave., Snider Ln., Beech Ave., Aramat Dr.

Under Construction: Linden Ln., Eldrid Dr., Johnson Ave.

Candidate Projects for FY09 and FY10: Town of Glen Echo, Village of Chevy Chase, Whittier Blvd., Marymount Rd., Springloch Rd., Arrowood Dr.

OTHER DISCLOSURES

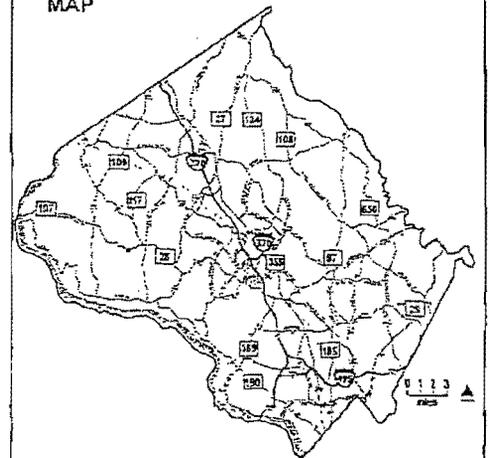
- A pedestrian impact analysis has been completed for this project.
- Expenditures will continue indefinitely.

APPROPRIATION AND EXPENDITURE DATA		
Date First Appropriation	FY81	(\$000)
First Cost Estimate	FY10	4,859
Current Scope		
Last FY's Cost Estimate		4,884
Appropriation Request	FY10	225
Supplemental Appropriation Request		0
Transfer		0
Cumulative Appropriation		3,634
Expenditures / Encumbrances		3,414
Unencumbered Balance		220
Partial Closeout Thru	FY07	0
New Partial Closeout	FY08	0
Total Partial Closeout		0

COORDINATION

Montgomery County Department of Environmental Protection
Maryland-National Capital Park and Planning Commission
Maryland Department of the Environment
United States Army Corps of Engineers
Montgomery County Department of Permitting Services
Utility Companies
Annual Sidewalk Program

MAP



County Council

Facility Planning: SM -- No. 809319

Category
Subcategory
Administering Agency
Planning Area

Conservation of Natural Resources
Stormwater Management
Environmental Protection
Countywide

Date Last Modified
Required Adequate Public Facility
Relocation Impact
Status

March 18, 2009
No
None
On-going

EXPENDITURE SCHEDULE (\$000)

Cost Element	Total	Thru FY08	Rem. FY08	Total 6 Years	FY09	FY10	FY11	FY12	FY13	FY14	Beyond 6 Years
Planning, Design, and Supervision	8,095	4,964	193	2,938	855	383	425	425	425	425	0
Land	0	0	0	0	0	0	0	0	0	0	0
Site Improvements and Utilities	0	0	0	0	0	0	0	0	0	0	0
Construction	0	0	0	0	0	0	0	0	0	0	0
Other	42	42	0	0	0	0	0	0	0	0	0
Total	8,137	5,006	193	2,938	855	383	425	425	425	425	*

FUNDING SCHEDULE (\$000)

Current Revenue: General	7,200	4,069	193	2,938	855	383	425	425	425	425	0
State Aid	140	140	0	0	0	0	0	0	0	0	0
Stormwater Management Waiver Fees	797	797	0	0	0	0	0	0	0	0	0
Total	8,137	5,006	193	2,938	855	383	425	425	425	425	0

DESCRIPTION

This project provides funds for facility planning and feasibility studies to evaluate watershed conservation needs and identify remedial project alternatives for stormwater management, stormwater retrofit, low impact design (LID), and stream restoration projects. In addition, facility planning serves as a transition stage for a project. Selected projects vary in type including: preparation of watershed conservation plans assessing stream erosion and habitat; inventories of alternative stream restoration and retrofit projects; complementary non-structural measures to help mitigate degraded stream conditions in rural and developed watersheds; identification of potential flood problems and flood damage reduction measures; and hydrologic, hydraulic, and water quality monitoring and analyses as required to quantify impacts of watershed development and projects to be implemented. Facility planning is a decision-making process that investigates critical project elements such as: usage forecasts; economic, social, environmental, and historic impact analyses; public participation; potential non-County funding sources; and detailed project cost estimates. Facility planning represents planning and preliminary design and develops a program of requirements in advance of full programming of a project.

COST CHANGE

Reduce funding and expenditures for fiscal capacity.

JUSTIFICATION

Facility planning supports requirements for watershed assessments required in the County's National Pollutant Discharge Elimination System (NPDES) stormwater permit for municipal stormwater discharges and implements the Countywide Stream Protection Strategy (CSPS, 2003). There is a continuing need for the development of accurate cost estimates and an exploration of alternatives for proposed projects. This project establishes the facilities planning data and alternatives analyses needed to identify and set priorities for individual capital projects. Facility planning costs for projects which are ultimately included in stand-alone Project Description Forms (PDFs) are reflected here and not in the resulting individual project. Future individual CIP projects which result from facility planning will each reflect reduced planning and design costs.

The CSPS identified the condition of County watersheds and prioritized subwatersheds for protection and/or restoration. Facility planning studies are targeted based on the CSPS.

OTHER

Ongoing projects are in the Muddy Branch, and Great Seneca Creek watersheds. Projects planned for FY09-10 include: Continuation of the Great Seneca Creek and Muddy Branch Feasibility studies; initiation of the Anacostia Watershed Restoration Plan, and an automated fixed monitoring station operation required by the National Pollutant Discharge Elimination System permit.

OTHER DISCLOSURES

- The Executive asserts that this project conforms to the requirements of relevant local plans, as required by the Maryland Economic Growth, Resource Protection and Planning Act.
- * Expenditures will continue indefinitely.

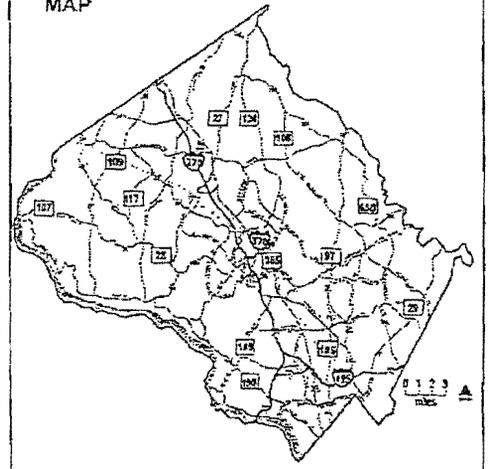
APPROPRIATION AND EXPENDITURE DATA

Date First Appropriation	FY93	(\$000)
First Cost Estimate		
Current Scope	FY10	8,137
Last FY's Cost Estimate		8,179
Appropriation Request	FY10	383
Supplemental Appropriation Request		0
Transfer		0
Cumulative Appropriation		6,054
Expenditures / Encumbrances		5,553
Unencumbered Balance		501
Partial Closeout Thru	FY07	0
New Partial Closeout	FY08	0
Total Partial Closeout		0

COORDINATION

Maryland-National Capital Park and Planning Commission
U. S. Army Corps of Engineers
Washington Suburban Sanitary Commission
Department of Permitting Services
Department of Transportation

MAP



County Council

Energy Conservation: MCG -- No. 507834

Category
Subcategory
Administering Agency
Planning Area

General Government
County Offices and Other Improvements
General Services
Countywide

Date Last Modified
Required Adequate Public Facility
Relocation Impact
Status

March 18, 2009
No
None.
On-going

EXPENDITURE SCHEDULE (\$000)

Cost Element	Total	Thru FY08	Rem. FY08	Total 6 Years	FY09	FY10	FY11	FY12	FY13	FY14	Beyond 6 Years
Planning, Design, and Supervision	270	0	0	270	45	45	45	45	45	45	0
Land	0	0	0	0	0	0	0	0	0	0	0
Site Improvements and Utilities	0	0	0	0	0	0	0	0	0	0	0
Construction	1,217	0	77	1,140	240	180	180	180	180	180	0
Other	0	0	0	0	0	0	0	0	0	0	0
Total	1,487	0	77	1,410	285	225	225	225	225	225	-

FUNDING SCHEDULE (\$000)

Current Revenue: General	4	0	4	0	0	0	0	0	0	0	0
G.O. Bonds	1,483	0	73	1,410	285	225	225	225	225	225	0
Total	1,487	0	77	1,410	285	225	225	225	225	225	0

OPERATING BUDGET IMPACT (\$000)

Maintenance				-168	-8	-16	-24	-32	-40	-48
Energy				-777	-37	-74	-111	-148	-185	-222
Net Impact				-945	-45	-90	-135	-180	-225	-270

DESCRIPTION

This program provides for profitable energy conservation retrofits in County-owned buildings. Retrofits to lighting systems, building envelopes, heating and cooling controls, and boiler efficiency upgrades are provided through this project. A central Energy Management and Control System (EMS) has been installed to monitor major buildings. Energy audits have been conducted to identify and prioritize energy conservation projects throughout the 35 largest buildings. Advanced energy-saving technologies are introduced into County facilities as they become economical and reliable. Retrofits are performed during off hours and do not disrupt services at affected buildings. For new construction and renovation projects, energy design guidance is provided to contractors, and energy budgets are developed and enforced. Utility costs for County facilities are monitored in a computer database.

JUSTIFICATION

This program is part of the County's cost-containment program. The projects pay for themselves in a short time, generally one to five years. The County then continues to benefit for many years through lower utility costs. The program is environmentally responsible in reducing the need for utility power plants and decreasing greenhouse gas emissions. The project fulfills the County's voluntary commitment to reduce energy use in all its buildings under the EPA Energy Star Buildings Program. The project is necessary to fulfill the mandate of Montgomery County Code Section 8-14A, Building Energy Design Standards. Improvements in lighting and HVAC controls also improve employee comfort and productivity. Major retrofits of these energy technologies will be made at all County facilities not presently scheduled for renovation. Future maintenance costs are also reduced.

FISCAL NOTE

Replace current revenue with GO bonds in FY09.

OTHER DISCLOSURES

- * Expenditures will continue indefinitely.

APPROPRIATION AND EXPENDITURE DATA	COORDINATION	MAP																																																
<table border="1"> <tr> <td>Date First Appropriation</td> <td>FY78</td> <td>(\$000)</td> </tr> <tr> <td>First Cost Estimate</td> <td></td> <td></td> </tr> <tr> <td>Current Scope</td> <td>FY10</td> <td>1,487</td> </tr> <tr> <td>Last FY's Cost Estimate</td> <td></td> <td>1,746</td> </tr> <tr> <td colspan="3"> </td> </tr> <tr> <td>Appropriation Request</td> <td>FY10</td> <td>225</td> </tr> <tr> <td>Supplemental Appropriation Request</td> <td></td> <td>0</td> </tr> <tr> <td>Transfer</td> <td></td> <td>0</td> </tr> <tr> <td colspan="3"> </td> </tr> <tr> <td>Cumulative Appropriation</td> <td></td> <td>362</td> </tr> <tr> <td>Expenditures / Encumbrances</td> <td></td> <td>80</td> </tr> <tr> <td>Unencumbered Balance</td> <td></td> <td>282</td> </tr> <tr> <td colspan="3"> </td> </tr> <tr> <td>Partial Closeout Thru</td> <td>FY07</td> <td>9,716</td> </tr> <tr> <td>New Partial Closeout</td> <td>FY08</td> <td>259</td> </tr> <tr> <td>Total Partial Closeout</td> <td></td> <td>9,975</td> </tr> </table>	Date First Appropriation	FY78	(\$000)	First Cost Estimate			Current Scope	FY10	1,487	Last FY's Cost Estimate		1,746				Appropriation Request	FY10	225	Supplemental Appropriation Request		0	Transfer		0				Cumulative Appropriation		362	Expenditures / Encumbrances		80	Unencumbered Balance		282				Partial Closeout Thru	FY07	9,716	New Partial Closeout	FY08	259	Total Partial Closeout		9,975	<p>Energy Conservation Work Program - Energy Star Upgrades Department of General Services</p>	
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County Council

(17)

from the Employees' Retirement System (ERS), Retirement Savings Plan (RSP), Retiree Health Benefit Trust (RHBT), and the General Fund on behalf of the Montgomery County Deferred Compensation Plan (DCP) trust funds and are, therefore, not appropriated here. The Board of Investment Trustees manages the assets of the ERS and RHBT through its investment managers in accordance with the Board's asset allocation strategy and investment guidelines. The Board also administers the investment programs for the RSP and DCP. The Board consists of 13 trustees including the Directors of Human Resources, Finance, Management and Budget, and the Council Staff; one member recommended by each employee organization; one active employee not represented by an employee organization; one retired employee; two members of the public recommended by the County Council; and two members of the general public.

FY10 Recommended Changes	Expenditures	WYs
FY09 Approved	0	0.0
FY10 CE Recommended	0	0.0

Boards, Committees, and Commissions

There are approximately 75 boards, committees, and commissions, created by law or resolution, which serve the County for a variety of purposes. These funds provide for the reimbursement of certain expenses incurred by eligible members of boards, committees, or commissions while on official business and/or for expenses related to the establishment of any new boards, committees, or commissions.

FY10 Recommended Changes	Expenditures	WYs
FY09 Approved	20,000	0.0
Increase Cost: Dependent Care and Travel Reimbursement	7,000	0.0
FY10 CE Recommended	27,000	0.0

Charter Review Commission

Section 509 of the County Charter requires that a Charter Review Commission be appointed by the County Council every four years, within six months after the Council assumes office, for the purpose of studying the Charter. The Commission shall report at least once to the Council on the Commission's activities within one year after appointment. Commission reports shall be submitted no later than May 1 of every even-numbered year. The reports shall contain recommendations concerning proposed Charter amendments, if any. This NDA provides for the expenses of the Commission.

FY10 Recommended Changes	Expenditures	WYs
FY09 Approved	150	0.0
Increase Cost: Biennial Cycle Adjustment	1,350	0.0
FY10 CE Recommended	1,500	0.0

Climate Change Implementation

This NDA provides funding to implement the initiatives the Council adopted in Bills 29-07, Environmental Sustainability - Climate Protection - Motor Vehicles; 30-07, Buildings - Energy Efficiency; 32-07, Environmental Sustainability - Climate Protection Plan; and 35-07, Consumer Protection - Energy and Environmental Advocacy; and to fund the Clean Energy Rewards program established in County Code 18A-11.

FY10 Recommended Changes	Expenditures	WYs
FY09 Approved	1,561,000	0.0
Add: Initial Implementation of Sustainability Working Group Recommendations	50,000	0.0
Increase Cost: Group Insurance Adjustment	280	0.0
Technical Adj: Annualization of FY09 Personnel Costs	0	0.5
Decrease Cost: Adjust Clean Energy Rewards Based on Projected Participation	-43,000	0.0
Decrease Cost: Elimination of One-Time Items Approved in FY09	-844,020	0.0
FY10 CE Recommended	724,260	0.5

Closing Cost Assistance

This NDA provides financing for real estate closing cost expenses to assist moderate- to middle-income home buyers. Eligible first-time home buyers can receive a seven-year loan under the program to help pay the settlement expense of a home purchase. The maximum amount of loans is the lesser of \$7,500 or five percent of the sale price of the single-family residence. The Housing Opportunities Commission (HOC) administers and operates the program. As part of an arrangement between HOC and the Federal National Mortgage Association (Fannie Mae), the County has established this account to help defray program operating costs

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T&E, April 22, Agenda Item #3 Council Staff Packet Excerpt

Telecommuting Action Plan

Bill 29-07, "Environmental Sustainability – Climate Protection – Motor Vehicles rate" included requirements to establish a telecommuting action plan with numerical targets for County employee participation. The exact language of the bill is below:

33-24. Telecommuting.

(a) Definitions. In this Section, the following words have the meanings indicated:

"Director" means the Director of the Department of Human Resources or the Director's designee.

"Sustainability Working Group" means the Group defined in Section 18A-13.

"Telecommute" means a work arrangement in which some or all of the work is performed at an alternative work site such as a home or office space near a home.

(b) Telecommuting Action Plan. The [[Director]] Sustainability Working Group must prepare a Telecommuting Action Plan that sets out a plan for increasing the number of County employees who telecommute.

(c) Contents. The Telecommuting Action Plan must:

- (1) set numerical goals for the number of County employees who telecommute;
- (2) identify the circumstances under which a County employee may telecommute; and
- (3) identify procedures that a County employee must follow to obtain permission to telecommute.

(d) Annual report. The [[Director]] Sustainability Working Group must report to the County Executive and County Council by [[September 1]] January 15 of each year on the actions taken in the preceding fiscal year to implement the Telecommuting Action Plan.

As part of the FY09 Budget, \$34,480 was included for a part-time position in the Office of Human Resources to manage this effort and \$97,500 for outfitting 25 employees with laptop computers, blackberry devices, and network hardware at a cost of \$3,900 per employee. The FY10 budget includes resources to continue the part-time position and to outfit another 25 employees. These costs were first forwarded to the Council during its deliberations on Bill 29-07.

Council Staff is skeptical of the need for the outfitting costs for several reasons:

1. No telecommuting action plan has been presented to the Council for discussion. It appears to be premature to invest substantial dollars without an understanding of the short and long-term program being put in place.
2. Many employees probably already own their own computer equipment and cell phones and would not need additional equipment purchased at the County's expense.
3. Since telecommuting provides a family-friendly benefit (and cost savings in terms of commuting-related costs to employees) it is not clear why the County should invest substantial dollars to subsidize an employee for this. Would the County also be responsible for upgrading this equipment later? What about the monthly charges for blackberry service?

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4. It is not clear why a blackberry device is needed. Employees can use land-line phones, their own cell phones (perhaps with a reimbursement for business-related calls), and email services from their own computers.
5. Since this program is requested to be funded in the Climate Implementation NDA, then a tangible and cost-effective carbon reduction benefit should be realized. However, in this case, the expenditures requested provide for only a small number of employees to telecommute. If these employees only telecommute part-time (perhaps once per week or once every two weeks) the environmental benefit for the investment made is even further reduced. It is not clear that this is the best investment of dollars to reduce greenhouse gas emissions. The consultant work with the SWG (mentioned above) may provide some help here in terms of prioritizing greenhouse gas reduction efforts.

In Council Staff's experience, the primary impediment to even part-time telecommuting (other than jobs that preclude telecommuting altogether, such as bus drivers, uniformed public safety officers, etc..) is the lack of interest in such an arrangement by either an employee or an employee's manager, not lack of the necessary equipment.

Council Staff has forwarded these concerns to Office of Human Resources (OHR) staff for comment and requested that they be available to discuss these issues at the T&E worksession.

Absent compelling information from OHR staff, Council Staff recommends that no additional dollars for equipment be spent in FY09 or approved for FY10 until a telecommuting action plan is discussed by the Council and the issues associated with it (including those mentioned above) are addressed. If the OHR position has not been filled yet, then that position should remain vacant and the associated dollars not spent as well until this discussion can take place.

Alternate work week/telcommuting survey results

	Total Alt.				Work Telecom- Week muting	Total Positions	% AWW	% AWW & TC	
	Compressed	4 x 10 Hours	Flex	12 hour					
Legislative									
County Council	4	0	3	0	7	0	85	8.2%	8.2%
Board of Appeals	0	0	0	0	0	0	4	0.0%	0.0%
Inspector General	0	0	0	0	0	0	5	0.0%	0.0%
Legislative Oversight	0	0	0	0	0	0	11	0.0%	0.0%
Merit System Protection Board	0	0	0	0	0	0	2	0.0%	0.0%
People's Counsel	0	0	0	0	0	0	2	0.0%	0.0%
Zoning and Administrative Hearings	0	0	0	0	0	0	4	0.0%	0.0%
	0	0	0	0	0	0	0		
Subtotal Legislative	4	0	3	0	7	0	113	6.2%	6.2%
Executive									
Board of Investment Trustees	4	0	0	0	4	0	6	66.7%	66.7%
County Executive	0	0	0	0	0	0	59	0.0%	0.0%
Board of Elections	0	0	0	0	0	0	28	0.0%	0.0%
Commission for Women	0	0	1	0	1	0	13	7.7%	7.7%
Community Use of Public Facilities	2	0	10	0	12	0	28	42.9%	42.9%
County Attorney	0	0	0	0	0	0	76	0.0%	0.0%
Consumer Protection	14	1	0	0	15	0	22	68.2%	68.2%
Economic Development	0	0	2	0	2	0	53	3.8%	3.8%
Environmental Protection	21	8	0	0	29	2	152	19.1%	20.4%
Ethics Commission	0	0	0	0	0	0	3	0.0%	0.0%
Finance	18	0	6	0	24	2	133	18.0%	19.5%
Housing and Community Affairs	27	0	0	0	27	0	90	30.0%	30.0%
Human Resources	0	0	1	0	1	0	84	1.2%	1.2%
Human Rights	1	3	7	0	11	8	21	52.4%	90.5%
Intergovernmental Relations	1	0	0	0	1	1	5	20.0%	40.0%
Liquor Control	0	0	0	0	0	0	324	0.0%	0.0%
Management and Budget	0	0	2	0	2	0	34	5.9%	5.9%
General Services	7	112	6	0	125	0	460	27.2%	27.2%
Public Information	5	0	0	0	5	1	12	41.7%	50.0%
Public Libraries	1	0	20	0	21	0	481	4.4%	4.4%
Transportation (DOT)	184	92	30	0	306	0	1,428	21.4%	21.4%
Permitting Services	0	0	0	0	0	0	221	0.0%	0.0%
Recreation	12	2	13	0	27	1	167	16.2%	16.8%
Regional Services Centers	0	0	0	0	0	0	35	25.7%	25.7%
BCC	3	0	0	0	3	0			
Midcounty	0	0	1	0	1	0			
Silver Spring	0	1	0	0	1	0			
East County	0	0	0	0	0	0			
UpCounty	0	0	4	0	4	0			
Technology Services	0	0	62	0	62	11	177	35.0%	41.2%
Urban Districts	0	0	0	0	0	0	33	0.0%	0.0%
Correction and Rehabilitation	0	22	14	0	36	0	568	6.3%	6.3%
Fire Rescue	15	8	10	0	33	1	1,267	2.6%	2.7%
Health and Human Services	268	13	102	0	383	6	1,761	21.7%	22.1%
Emergency Mgt & Homeland Security	0	3	3	0	6	0	10	60.0%	60.0%
Police	126	829	18	45	1,018	5	1,852	55.0%	55.2%
Subtotal Executive	709	1,094	312	45	2,160	38	9,603	22.5%	22.9%
Sheriff	2	33	16	0	51	0	181	28.2%	28.2%
Circuit Court	0	0	0	0	0	0	119	0.0%	0.0%
State's Attorney	0	0	0	0	0	0	125	0.0%	0.0%
Subtotal Judicial	2	33	16	0	51	0	425	12.0%	12.0%
Grand Total	715	1,127	331	45	2,218	38	10,141	21.9%	22.2%
% of Workforce by AWW Category	7.1%	11.1%	3.3%	0.4%	21.9%	0.4%	22.2%		

9





OFFICE OF HUMAN RESOURCES

Isiah Leggett
County Executive

Joseph Adler
Director

MEMORANDUM

October 26, 2009

TO: Duchy Trachtenberg, Chair
Management and Fiscal Policy Committee

FROM: Joseph Adler, Director
Office of Human Resources

SUBJECT: Telework Update

The County Executive and senior leadership continues to be supportive of all forms of alternate work schedules including telework. During FY10, OHR will continue to work with departments on implementing and evaluating all forms of alternate work schedules. In addition, OHR will be interviewing prospective candidates for a part-time Telework Coordinator position to promote, monitor, and evaluate telework and other forms of alternate work schedules within Montgomery County Government. We expect to fill the Telework Coordinator position by November, 2009.

The County has over 2,053 employees, or 21% of its workforce, currently participating in alternate work schedules such as compressed, 4/10 work week, telework, and flexing work hours (see Attachment A).

We will continue to work with County departments to monitor and assess all Alternate Work Schedules as well as increase the visibility and adoption of these programs to save energy, protect the environment, and mitigate traffic congestion.

JA:ab

Attachment

ATTACHMENT A

Summary and Action Plan

Alternate Work Schedules

Summary

The Office of Human Resources is leading a County-wide initiative to expand the use of Alternate Work Schedules (AWS) to save energy, protect the environment, mitigate traffic congestion and to help employees reduce their fuel cost and commuting time while providing continuous improvement in customer service.

Since October, 2008, 31 out of 37 Montgomery County departments have implemented AWS. Twenty-two departments have employees who participate in Four 10-hour Work Day Schedule. The County continues to implement, on a phased in basis, AWS within numerous County departments.

In FY 10, 2,053 employees are participating in an AWS which is a 12% increase over FY09. This is due to the implementation of 4/10 Work Week. The number of employees participating in Telework has decreased by 18% from 38 to 31 as more employees have chosen other types of AWS including 4/10 Work Week, Compressed Work Week Schedule, Flex-time, and 12-Hour Work Week. Overall, in FY 10, over 21% of Montgomery County Government employees are participating in one type of AWS.

The following departments have no staff participating in AWS.

1. Board of Appeals
2. Ethics Commission
3. Legislative Oversight
4. Merit System Protection Board
5. People's Council
6. Sheriff's Office
7. Zoning and Administrative Hearing

Currently the Office of Human Resources is interviewing candidates for a part-time Telework Coordinator position which is expected to be filled in November, 2009. This individual will be responsible for developing a County-wide Telework Action Plan and a comprehensive evaluation strategy of all AWS including the Four 10-hour Work Schedule beginning in January, 2009.

**Montgomery County Update on Alternative Work Schedules
(AWS) including 4/10, Compressed Work Schedule, 12-Hour,
Flex-Time, and Telecommuting**

Summary

Comparison FY 09 vs. FY10

	FY10	FY 09	Comments
Total number of departments participating	31	26	19% increase
Total number of employees participating in AWS	2,053	1,832*	12% increase *This figure includes the 221 eligible positions that were approved and sent to payroll in FY 09-10 as part of the 4/10 work week phased-in implementation.
Number of Eligible 4/10 positions approved by Department, OHR, CAO	998	960*	*Phased-in, 12 month implementation began in 1/09. In October 2008, anticipated between 955-1,094 positions would be eligible. Final number of positions approved was 998.
Number of Eligible 4/10 positions approved and sent to Payroll	221*	221*	*Phased-in, 12-month implementation began in 1/09 with staggered departmental implementation spread out over FY 09-10. Additional departments are continuing to implement 4/10 Work Week Schedule.
Number of Employees on other AWS: (Compressed Work Schedule, 12 Hour, or Flex-time)	1,801	1,801	
Percentage of Total Number of Employees on AWS	21%	19%	2% increase Countywide
Number of Employees currently Telecommuting—Implemented in nine (9) departments.	31	38	18% decrease due to employees switching to other AWS options.

Alternate Work Schedule (AWS) Action Plan FY10

Fill Part-time Telework Coordinator position to promote, and monitor Telework and all alternate work schedules. Currently scheduling candidate interviews for the position (screened 122 applicants for the position) with anticipated hire date by end of November, 2009.	November 2009
In coordination with County Leadership and Department Directors establish the goals and scope of the AWS Program.	December 2009
Develop comprehensive, county-wide action plan, including revision of interim policies for program implementation to ensure conformance of these programs with County regulations, collective bargaining unit agreements, and personnel policies.	January 2010
Review and Evaluate 4/10 Work Schedule and other County AWS Programs.	January 2010
Test and implement Telework Computer Based Training (CBT) for managers and employees	February 2010
Develop standard Measures to monitor and assess all AWS. <ul style="list-style-type: none"> • Service delivery • Customer satisfaction • Employee morale • Productivity • Cost Savings 	May 2010
Continue to work with targeted departments to identify job types best suited to telecommute or participate in other AWS.	July 2010
Develop AWS information programs for managers and special events for employees to increase visibility and adoption of these programs within County departments.	July 2010



OFFICE OF HUMAN RESOURCES

Isiah Leggett
County Executive

Joseph Adler
Director

MEMORANDUM

May 7, 2010

TO: Executive Branch Department and Office Directors and Affected Managers

FROM: Joseph Adler, Director
Office of Human Resources 

SUBJECT: 4/10-Hour Workweek Alternative Work Schedule Program

In January 2009, the County officially implemented the 4/10-Hour Workweek Alternative Work Schedule (AWS) in a pilot program for interested departments. The Office of Human Resources (OHR) is conducting a survey to gather feedback on the outcomes of the program from department directors and managers who approved positions and/or supervised employees who participated in the 4/10-Hour Workweek Schedule Pilot Program.

Your feedback is required to help us assess the pilot program on four criteria:

- Service delivery to internal and external customers are maintained
- Operational requirements are met
- Normal business hours are maintained
- No additional costs to the county

Please take ten minutes to review the effectiveness of the 4/10-Hour Workweek AWS Pilot Program. To access to the survey, go to: <http://vovici.com/wsb.dll/s/3518g43613>

Your cooperation is greatly appreciated. If you have any additional questions, please contact me at 240-777-5100.

Questions and Answers
4 Day / 10 Hour Work Schedule Pilot
September 26, 2008

1. Q: Why is the County encouraging departments to evaluate opportunities to implement, or expand, the utilization of the four day, ten hour (4/10) work schedule?

A: The County Executive strongly supports the implementation of a voluntary 4/10 work schedule as a means to lower energy consumption and to help employees reduce their fuel costs and commuting time. On this basis, department directors are being asked to aggressively examine their operational requirements and to identify positions where voluntary 4/10 work schedules may be offered to employees.

2. Q: Who is eligible to work a 4/10 schedule?

A: With the exception of department directors, all non-probationary fulltime employees are eligible to be considered for a 4/10 work schedule.

3. Q: What criteria should be applied in evaluating the ability to grant employee requests to work a 4/10 schedule?

A: Departments must ensure that operational and programmatic requirements are not adversely affected by the implementation of a 4/10 work schedule. This includes: ensuring that normal service delivery to internal and external customers is maintained; ensuring that normal business hours are maintained; and ensuring that the action does not result in additional cost (e.g., overtime) to the County.

4. Q: Can I require an employee to work a 4/10 compressed schedule?

A: No. Participation in the 4/10 pilot program is voluntarily.

5. Q: How is overtime determined for an employee working a 4/10 schedule?

A: Non-exempt and Exempt employees, Grade 24 and below, will qualify for daily OT after being in a pay status for more than 10 hours in a day. Employees, Grade 25 and above, will qualify for OT after being in a pay status for more than 40 hours in a week. (MLS employees do not qualify for OT.)

6. Q: What happens if a holiday falls on an employee's scheduled day off?

A: The employee is to be given an alternative day off within the same week as the holiday. If this is not feasible, the employee is to be credited with 10 hours of compensatory time.

7. **Q: How is leave to be recorded?**

A: An employee working a 4/10 work schedule will record 10 hours of leave (e.g., annual, sick, personal, LWOP, etc.) for a full days absence.

8. **Q: How does a 4/10 compressed work schedule differ from a 9/80 compressed work schedule?**

A: The 4/10 compressed work schedule requires an employee to work four 10 hour days in a work week and there are no limitations on when the additional day off occurs. The 9/80 work schedule requires an employee to work eight, 9 hour days and one, 8 hour day within a pay period and the extra day off will always occur on a designated Monday, or a Friday, within the pay period.

9. **Q: Does working a compressed schedule affect my benefits?**

A: No.

10. **Q: How long will I be required to work a 4/10 schedule?**

A: This is a voluntary opportunity. However, to allow for sufficient time to evaluate the effect of this action, you will be asked to commit to working the 4/10 compressed work schedule for a 12 month period. At that time, the County will re-evaluate the program to determine if any changes are necessary.

11. **Q: Is the lunch period included in the 10 hour work schedule?**

A: No. Employees will be scheduled for 10½ hours, one-half hour of which will be an unpaid lunch period.

Alternative Work Schedule Implementation

Analysis & Recommendations

Purpose

The purpose of this report is to summarize analysis related to the 4-10 alternative work schedule implementation, highlight key findings, and provide recommendations, with the goal of informing decisions on future implementation of this program. The data used in this report is from an Office of Human Resources (OHR) administered survey to managers of non-represented employees.

Service Impacts & Operational Requirements

In general, respondents reported that service and staff coverage has been maintained. However, there are clearly instances where this is not the case; those specific impacts are more clearly evident through respondents' comments.

- 84% of managers (59 of 70) who responded to the survey reported that service delivery to customers has been maintained or improved.
 - Departments with at least 1 respondent reporting a decrease in service delivery: Finance (FIN), General Services (DGS), Human Resources (OHR), Permitting Services (DPS), Recreation (REC), Technology Services (DTS), Transportation (DOT).
- 74% of respondents (51 of 69) reported staff coverage or operations in the department during normal business hours has either been maintained or increased.
 - Departments with at least 1 respondent reporting a decrease in staff coverage: County Attorney (CAT), Board of Elections (BOE), FIN, DGS, Housing and Community Affairs (DHCA), OHR, DPS, REC, DTS.
- 65% of respondents (49 out of 75) rated management's satisfaction with service delivery as either a 4 or 5 (on a 1-5 scale, with 5 being the most positive).
 - Departments with at least 1 respondent who rated satisfaction at a 1: DGS, Health and Human Services (HHS), DTS.

Comments on the survey provide a somewhat different picture of this program. Of the comments related to service delivery impacts, 29% were positive, 31% were neutral, and 40% were negative, indicating a mixed bag of perceptions. In particular, specific themes related the negative impacts were evident, and are as follows:

- This schedule impacted meeting scheduling.
- This schedule impacted leave scheduling.
- More communication and supervision of employees was required.
- Workload requirements were not met and other employees had to compensate.
- Service was delayed or customer service levels were not met.

There was no pattern when viewing this information through the lens of department type or size. See Figures 1 and 2 for further detail on respondents' comments on service impacts.

Figure 1: Survey Comments Related to Service Impacts (Note: The number of comments does not correspond to the number of respondents.)

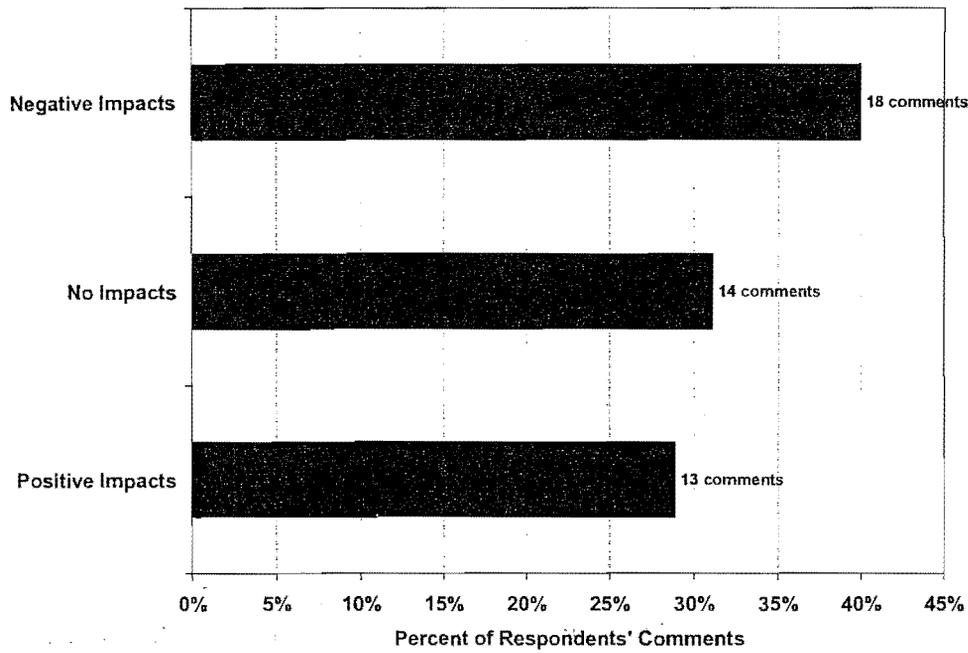
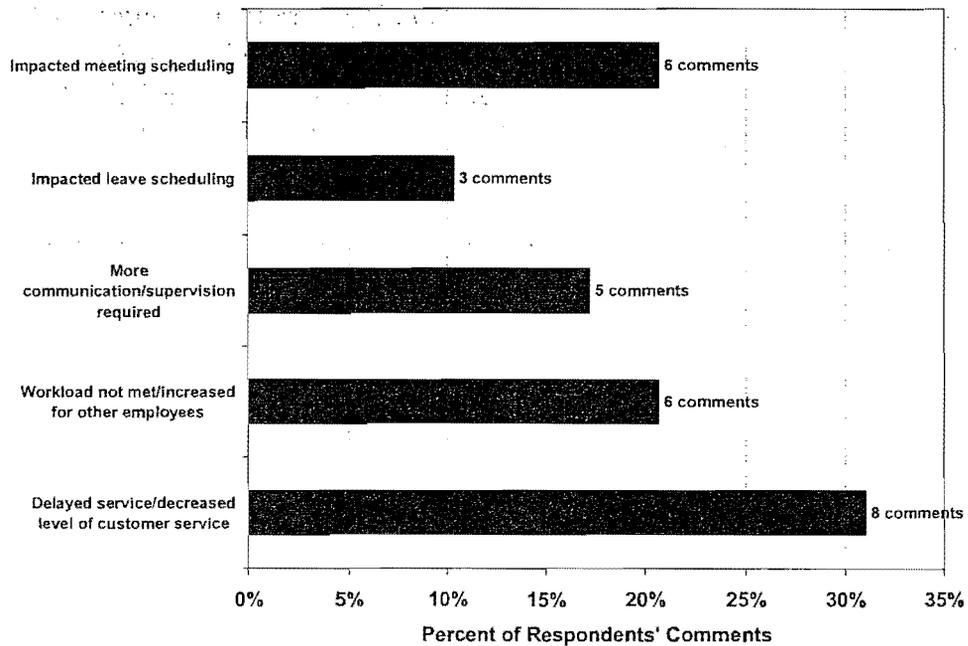


Figure 2: Themes of Comments Related to Negative Impacts (Note: The number of comments does not correspond to the number of "Negative Impacts" comments in Figure 1. Respondents could have reported impacts under multiple themes.)



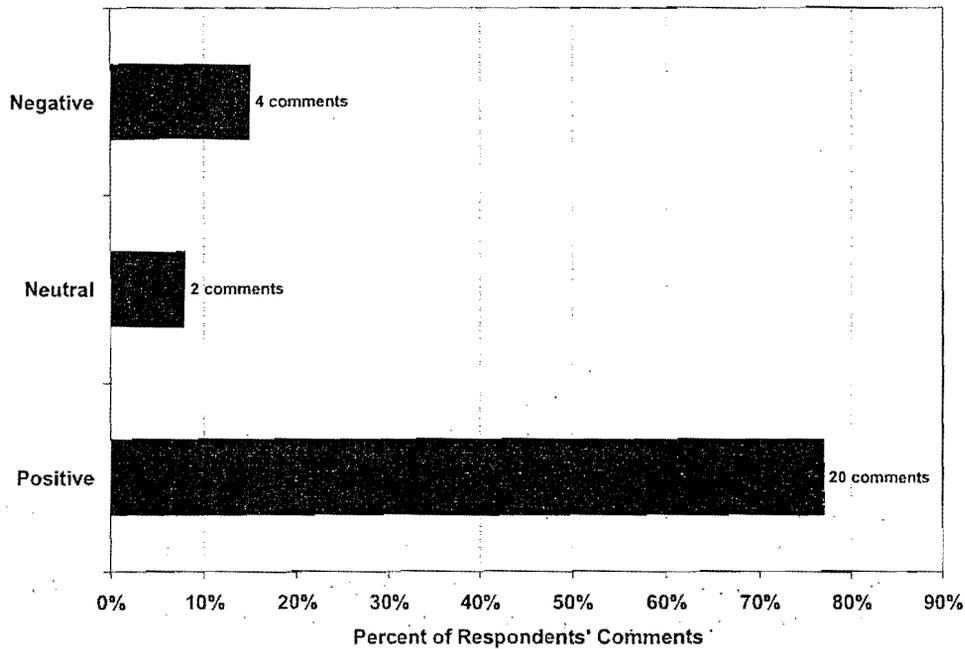
Leave Use

- 34% of respondents (26 out of 76) reported a change in leave use as a result the 4-10 implementation. 46% reported no change and 20% reported that they didn't know.

However, this question did not distinguish between a positive and negative change in leave use, so the comments have been used to answer this question.

- Based on the comments (Figure 3), for the most part, changes in leave use were positive, in that employees on 4-10 used less unscheduled leave because they scheduled medical appointments and the like on their off-day.

Figure 3: Survey Comments Related to Leave Use (Note: The number of comments does not correspond to the number of respondents.)



Labor Costs

- 82%, 84%, and 78% of respondents reported no change in labor costs related to overtime, shift differentials, or other costs, respectively, as a result of employees on an alternative work schedule.

Recommendations

- *Investigate Leave Use:* Drill further down in leave use impacts by comparing leave taken by participating employees to those not participating. This would require an analysis of data in either MCTime or Human Capital Management (Payroll). Upon initial examination, there is not a designation in HCM that would facilitate this analysis; therefore a list of employees on this schedule would have to be provided along with their employee ID (SSN) to filter the data appropriately. This analysis would therefore be possible, but non-trivial.
- *Investigate Individual Instances of Operational Failure:* Using the survey as a starting point, gather additional information on departments where individual managers are having service delivery and coverage issues. This information should be used by the department and OHR to determine if the 4-10 work schedule is appropriate in these cases.

This information may then be used to supplement the current policy with stipulations on the types of jobs and/or services for which this schedule is unworkable (i.e. call-takers, IT/administrative support, etc.)

- *Continue to Implement 4-10 Work Schedule with Stronger Guidance on Documentation:* According to the “Montgomery County Voluntary (“4/10”) Compressed Work Schedule Application,” the supervisor is charged with evaluating and recommending action on employee requests to work a compressed schedule according to certain criteria, including
 1. Operational requirements must be met.
 2. The implementation of the work schedule must not adversely affect or diminish the department’s ability to provide services during normal business hours.
 3. The implementation of an alternative work schedule must be cost-neutral to the department.
 4. The department must establish the work hours and work days predicated on the criteria documented above.

If the criteria for approval are not being met, there is the opportunity for the department to revert the schedule back to a 5-8 format, as long as notice is given along with the reason.

Considering this clear deference to operational needs, it seems that the policy does not need to be further strengthened on this point. However, it would be helpful to managers for OHR to issue specific guidelines on how to appropriately document that operational requirements are not being met, that additional costs are being incurred, and so forth. This guidance and support from OHR to departments would greatly assist managers to make the necessary changes to individual employees’ work schedules, while allowing compliant employees to continue to enjoy this additional work flexibility.

- *Review Alternative Work Schedule Best Practices:* To ensure that Montgomery County continues to follow accepted best practices related to all the variations of alternative work schedules offered, including 4-10, compressed, telecommuting, and flex-time, OHR should periodically review the practices of other local jurisdictions where these policies are successful. This review should not only include policies and processes to implement and maintain these alternative work schedules, but should also take into consideration how organizations measure the success of these policies.
- *Provide Training on Effective Alternative Work Schedule Implementation to Managers and Employees:* In consideration of the variety of experiences related to this policy, it will be important to appropriately educate both managers and employees on how to best incorporate new work schedules into their operations. For managers, this should include setting performance expectations for employees, determining operational requirements and coverage minimums and communicating this to employees, and management rights related to leave approval. For employees, this should include strategies on how best to make use of work time before and after standard business hours, and effective communication with management.



OFFICE OF HUMAN RESOURCES

Isiah Leggett
County Executive

Joseph Adler
Director

MEMORANDUM

September 1, 2010

TO: Executive Branch Department and Office Directors

FROM: Joseph Adler, Director
Office of Human Resources

SUBJECT: June 2010 Alternative Work Schedules Report

Attached you will find a report, issued in June of 2010 by CountyStat, regarding Alternative Work Schedules (AWS) in the County government. The Office of Human Resources provided CountyStat with assistance in survey question development, data analysis and program recommendations. OHR will continue to review AWS best practices and provide training to managers and employees on effective implementation of AWS. If your individual department is having service delivery or coverage issues, please contact Anita Brady at 240-777-5066 for additional guidance and support.

We hope you find the information contained in this report useful as your department evaluates AWS in the coming year.

Alternate Work Schedules Action Plan

The Office of Human Resources is leading a County-wide initiative to expand the use of "Alternate Work Schedules" to save energy, protect the environment, mitigate traffic congestion and to help employees reduce their fuel cost and commuting time while providing continuous improvement in customer service.

The following Alternate Work Schedules are currently utilized in Montgomery County:

- **Four-day work week** – A schedule, which allows employees to work 10 hours per day four days a week.
- **Compressed work schedule** – A schedule, which allows employees to work 9-hour days and have one day off every two weeks.
- **Flextime** – A schedule, which permits an employee to choose their starting and ending time while maintaining service during the County's core business hours.
- **Telecommuting** – A schedule, which permits employee (non-bargaining unit) to work from home one day every two weeks.

Since October 2008, the Office Human Resources has been working with operating departments and MCGEO to encourage and expand participation in the voluntary four 10-hour day workweek. To assist operating departments in their review and discussions with supervisors and managerial staff; the following criteria was established:

- Service delivery to internal and external customers will be maintained;
- Operational requirements must be met;
- Employee participation is voluntary;
- Offices or operations must be covered during normal period of public service five days a week;
- Success must be measured in relation to department headline performance measures; and
- Cost to the County will not be increased.

The Office of Human Resources is currently working with 26 departments to phase-in the four 10-hour day workweek for a 12-month time span. The Office of Human Resources has conducted Alternative Work Schedule Informational sessions for managers and a Frequently Asked Questions document to assist managers in implementing this program.

Alternate Work Schedules Summary and Action Plan

Summary

Telework implemented in nine (9) departments	Total Number of employees 38
An Interdepartmental team developed interim policies and procedures.	<ul style="list-style-type: none"> • Interim Telework Program Policy • Work Agreement and disclosure • Selecting Positions Eligible for Telework • Self- Assessment for employee and supervisors • Workspace Self-Certification checklist and Safety Guidelines • Work Plan Template • Telework Data Collection
Implementing Four 10-hour days in 26 departments since October 2008	<ul style="list-style-type: none"> • Created and implementing new payroll procedures for Alternative Work Schedules including Four 10-hour days • Conducted Alternative Work Schedule Informational Sessions for managers including 4/10 Work Week Frequently Asked Questions Document to assist in implementing Alternative Work Schedules. • Estimate number of targeted employees 955

Action Plan

Fill Part-time position to promote, and monitor telework and all alternate work schedules	March 2009
Establish goals, develop a plan, target several departments for a trial period	April 2009
Develop, test and implement Telework Computer Based Training (CBT) for managers and employees	May 2009
Develop standard Measures to monitor and assess all Alternate Work Schedules <ul style="list-style-type: none"> • Service delivery • Customer satisfaction • Employee morale • Productivity 	May 2009
Team with targeted departments identify job types best suited to telecommute	July 2009

Alternative Work Schedule Implementation

Analysis & Recommendations

Purpose

The purpose of this report is to summarize analysis related to the 4-10 alternative work schedule implementation, highlight key findings, and provide recommendations, with the goal of informing decisions on future implementation of this program. The data used in this report is from an Office of Human Resources (OHR) administered survey to managers of non-represented employees.

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There was no pattern when viewing this information through the lens of department type or size. See Figures 1 and 2 for further detail on respondents' comments on service impacts.

Figure 1: Survey Comments Related to Service Impacts (Note: The number of comments does not correspond to the number of respondents.)

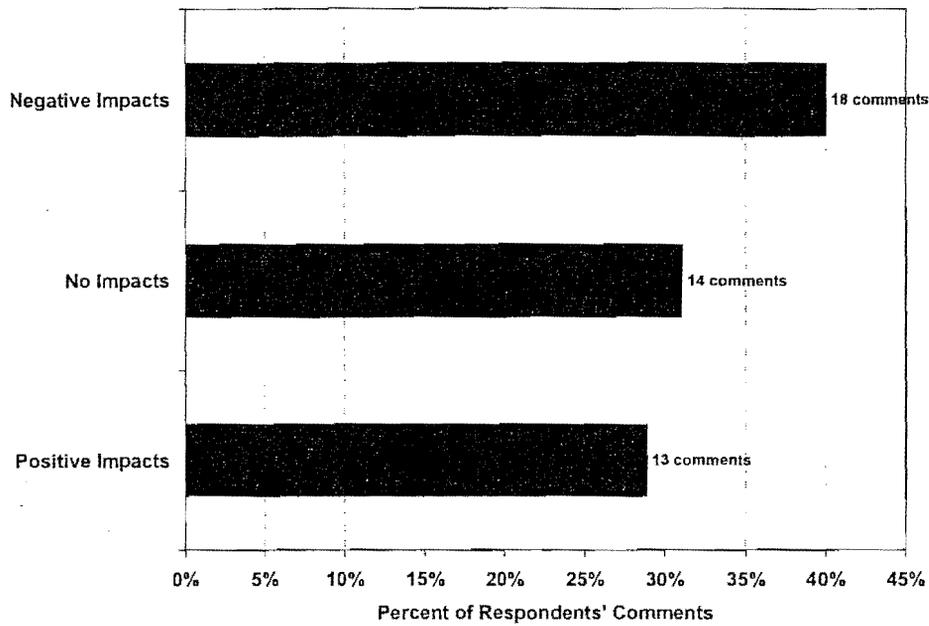
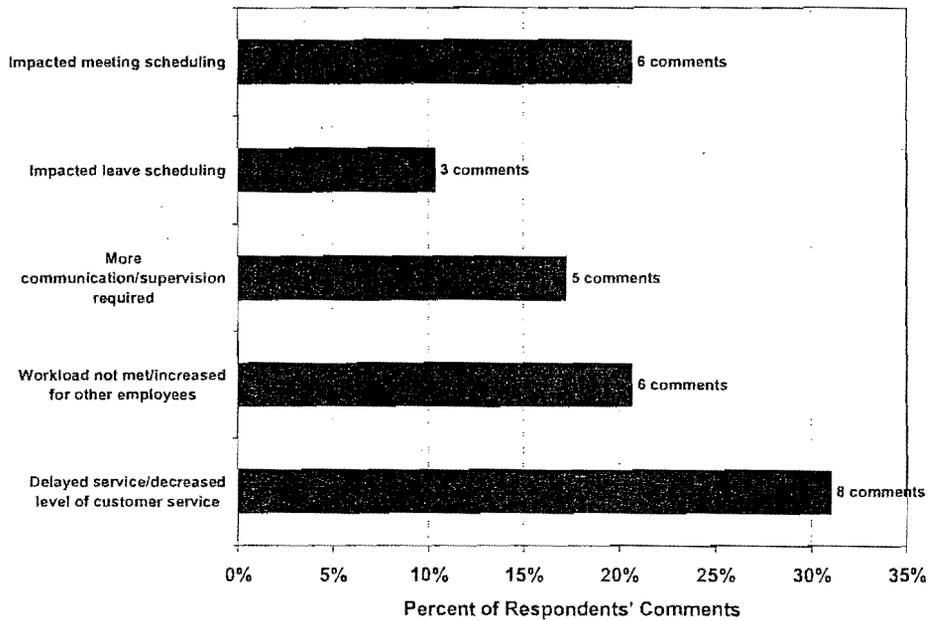


Figure 2: Themes of Comments Related to Negative Impacts (Note: The number of comments does not correspond to the number of "Negative Impacts" comments in Figure 1. Respondents could have reported impacts under multiple themes.)



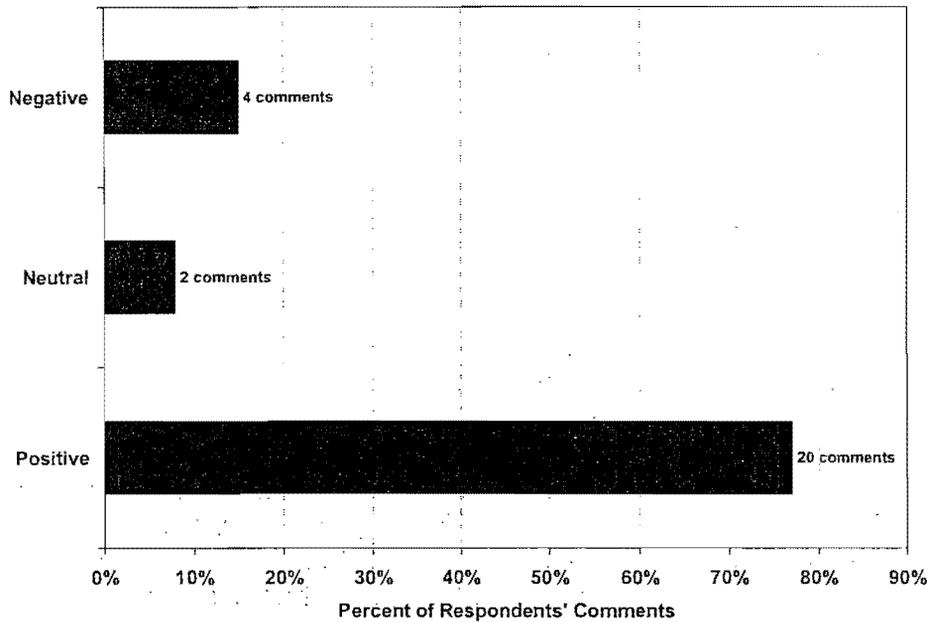
Leave Use

- 34% of respondents (26 out of 76) reported a change in leave use as a result the 4-10 implementation. 46% reported no change and 20% reported that they didn't know.

However, this question did not distinguish between a positive and negative change in leave use, so the comments have been used to answer this question.

- Based on the comments (Figure 3), for the most part, changes in leave use were positive, in that employees on 4-10 used less unscheduled leave because they scheduled medical appointments and the like on their off-day.

Figure 3: Survey Comments Related to Leave Use (Note: The number of comments does not correspond to the number of respondents.)



Labor Costs

- 82%, 84%, and 78% of respondents reported no change in labor costs related to overtime, shift differentials, or other costs, respectively, as a result of employees on an alternative work schedule.

Recommendations

- *Investigate Leave Use:* Drill further down in leave use impacts by comparing leave taken by participating employees to those not participating. This would require an analysis of data in either MCTime or Human Capital Management (Payroll). Upon initial examination, there is not a designation in HCM that would facilitate this analysis; therefore a list of employees on this schedule would have to be provided along with their employee ID (SSN) to filter the data appropriately. This analysis would therefore be possible, but non-trivial.
- *Investigate Individual Instances of Operational Failure:* Using the survey as a starting point, gather additional information on departments where individual managers are having service delivery and coverage issues. This information should be used by the department and OHR to determine if the 4-10 work schedule is appropriate in these cases.

This information may then be used to supplement the current policy with stipulations on the types of jobs and/or services for which this schedule is unworkable (i.e. call-takers, IT/administrative support, etc.)

- *Continue to Implement 4-10 Work Schedule with Stronger Guidance on Documentation:* According to the “Montgomery County Voluntary (“4/10”) Compressed Work Schedule Application,” the supervisor is charged with evaluating and recommending action on employee requests to work a compressed schedule according to certain criteria, including
 1. Operational requirements must be met.
 2. The implementation of the work schedule must not adversely affect or diminish the department’s ability to provide services during normal business hours.
 3. The implementation of an alternative work schedule must be cost-neutral to the department.
 4. The department must establish the work hours and work days predicated on the criteria documented above.

If the criteria for approval are not being met, there is the opportunity for the department to revert the schedule back to a 5-8 format, as long as notice is given along with the reason.

Considering this clear deference to operational needs, it seems that the policy does not need to be further strengthened on this point. However, it would be helpful to managers for OHR to issue specific guidelines on how to appropriately document that operational requirements are not being met, that additional costs are being incurred, and so forth. This guidance and support from OHR to departments would greatly assist managers to make the necessary changes to individual employees’ work schedules, while allowing compliant employees to continue to enjoy this additional work flexibility.

- *Review Alternative Work Schedule Best Practices:* To ensure that Montgomery County continues to follow accepted best practices related to all the variations of alternative work schedules offered, including 4-10, compressed, telecommuting, and flex-time, OHR should periodically review the practices of other local jurisdictions where these policies are successful. This review should not only include policies and processes to implement and maintain these alternative work schedules, but should also take into consideration how organizations measure the success of these policies.
- *Provide Training on Effective Alternative Work Schedule Implementation to Managers and Employees:* In consideration of the variety of experiences related to this policy, it will be important to appropriately educate both managers and employees on how to best incorporate new work schedules into their operations. For managers, this should include setting performance expectations for employees, determining operational requirements and coverage minimums and communicating this to employees, and management rights related to leave approval. For employees, this should include strategies on how best to make use of work time before and after standard business hours, and effective communication with management.