

As a manager, much of the responsibility for the success of your organization's telework program will fall to you. The manager determines which employees are permitted to telework, monitors their progress, provides support and encouragement, and determines if they are productive at telework. For some managers, becoming effective at managing teleworkers will mean a change in management style and technique. These changes will definitely enhance your own skill set and increase your value to the organization. Welcome to the 21st century and the world of telework.

Contents

- Understand the “Whys” of Telework
- Q & A for Telework Managers
- Tips for Telework Managers
- Evaluating a Request to Telework
- Turning Down a Request to Telework
- Evaluating Teleworkers
- Terminating Telework Agreements

Understand the “Why’s” of Telework

Right now some of you are thinking "Whose bright idea was it to offer telework to employees?" You may have doubts about how well this will work. You are probably thinking your job just got a lot tougher. Well, before you jump out a window, take the time to read why the world of work as you know it just changed and why that might not be such a bad thing.

- **Why your organization is offering telework:** Telework offers a number of potential benefits for an organization. Better employee retention, enhanced recruitment, compliance with commute trip reduction goals and reduced carbon emissions, to name a few. Some organizations want a cadre of employees who can work from home in the event of a disaster or other emergency. See the “Benefits of Telework” discussion on the Organization page.

For your organization, the important reasons are embodied in their telework goals. If no one has communicated these goals to you, you should ask. Knowing why telework is important to executive management will help you shape your management objectives.

- **Why some employees want to telework:** There are lots of reasons why employees may want to telework; like saving money, saving time, reducing stress, and being able to work on projects that require concentration, without the usual office distractions. See the “Benefits of Telework” discussion on the Employee page.

The employee benefit that managers need to understand best may be one that you can easily relate to. In the jargon, it's called the "work/life balance". Many employees find it difficult to do a good job of managing their home and family life with their professional life. Both can be demanding, particularly for those with children. Longer hours and longer commutes in recent years have only made the situation worse. In the past, the only option, if one wanted to keep working, was to just deal with it. But today, telework and flex-time work arrangements can ease some of the stress. Employees place high value on being home to have dinner with the family one or two days a week. Having a more flexible schedule makes it easier to meet life's demands. Many of those that telework are extremely motivated to preserve this benefit. You know better than anyone the value of motivated employees.

- **Why managers should welcome telework:** Technology changes how we work. It always has. There was a time, not too many years ago, when office workers wrote in long hand or dictated, and secretaries typed everything. Large organizations had rooms full of typists. The PC changed that. Those that didn't know how to type had to learn. Email has changed how we correspond. Cell phones have eliminated the need to be in a specific place to make or receive a call. These changes, and others, have made "workplace" mean something totally different. Today, the workplace can be anywhere. It can even follow you wherever you go.

Just like the workers that had to learn to type, you can learn to use new tools and techniques to do your job. Many managers have discovered that the techniques they adopt for teleworkers are so effective that they use them for all workers, even those that never telework. And, with your new management skills and new technology skills, you will increase

your value to the organization and in the job market. "Accomplished Telework Manager" looks good on the resume. Those are good reasons to welcome the move to telework.

Peter Drucker, the famous management guru said that "Management is doing things right; leadership is doing the right things." Your organization's leaders have decided that telework is right for the organization. As a manager, your job is to make sure it's done right.

Q How do I know employees are really working when they're at home?

A The simple answer is to trust your employees to do the work. Some employees will respond very well to this trust and will work hard to deserve your trust. Others won't, at least not at first, and you will need to use worker logs or other devices, as well as occasional check-ins, to monitor their progress. Of course, trust is earned, and the real measure of whether or not your employees are working is the quantity and quality of work they produce. It is more important to see the work than to see the worker.

Some managers establish expectations by discussing and agreeing with the employee on home assignments. The value of such agreements depends on the individual employee, the amount of time they work at home, and the manager's own comfort level with the employee.

Q Won't all my employees want to telework?

A No. Many employees prefer to come to the office where they can socialize and work around others. The upper limit on how many employees are out of the office is really up to you and the organization. Is there a tipping point at which having too many people out of the office is harmful to the organization? Does management want as many people as possible teleworking?

Q My management style is pretty spontaneous. When I need something from an employee I just ask them. How do I do that when they aren't here?

A You can still "just ask them", but use the phone, email or Instant Messaging.

Q Won't having workers away from the office mean more work for those that stay?

A How do you assign work? If you just hand it to the most convenient person, then yes, those in the office may get more than their fair share. Be equitable in how the workload is distributed. It's also possible that if teleworkers need access to files in the office they will call colleagues at work to have files emailed. If this happens very often, it can become a burden on those back in the office. The use of technology, or just better discipline on the part of the employee, can solve that problem.

Q We work as a team. Won't telework ruin that?

A Distance isn't a barrier for most employees. Most quickly adapt to IM/Chat, or other communication and collaboration technologies. For the great majority of work that needs to be done, this kind of communication works fine. There is no doubt that a real synergy can develop in a meeting of the right individuals brainstorming together. But how often does this need to happen? If it's an everyday thing, then these employees may not be suitable for telework. If such meetings can be scheduled, then employees can telework other times. In an office where employees work at home a lot, some may seldom see each other. You may want to schedule days when everyone will be present or social events that everyone attends, to help preserve the sense of camaraderie.

Q How many days do teleworkers work from home?

A Unless the telework policy limits the number of days, that decision is up to you. It is usually decided on a case-by-case basis and depends on how ready you think the employee is, how much work they have that is suitable to be done from home, and how frequently they are needed at the office. You might want to start with only one day a week and increase the limit if the quality and quantity of work is acceptable.

Q It seems chaotic. How will employees know where other employees are?

A Teleworkers need to post their schedules so that everyone knows when they are working from home and when they will be in the office. This can be as simple as emailing their schedule to coworkers. If calls aren't being forwarded to the employee, all coworkers should have the employee's home phone number.

Q How do I know that employees have a suitable and safe place at home to work?

A This is the employee's responsibility. The toolkit includes guidelines for setting up a home office. In addition, the organization's telework policy may have minimum requirements that the employee must meet. Failure to do so could mean disqualification for telework.

Tips for Telework Managers

- **Give Telework a Fair Shake:** Take the program seriously and reserve judgment until you have some objective data on which to form an opinion. Understand where telework fits into the vision and goals of the organization and communicate that to your team. Make whatever adaptations in management style you need to make to be an effective telework manager.
- **Understand the Policies:** Your organization may have prepared a number of policies or guidelines; some exclusive to telework and some applicable to all employees. Examples include the Telework Policy, an Equipment Policy, a Security Policy, and a Disaster Preparedness policy. Take the time to familiarize yourself with the policies. Knowing them will help you manage teleworkers. Understand where you have flexibility and where policies are firm.
- **Select the Right Employees:** Don't approve telework just because an employee applies for it. Encourage employees to use the self-assessment form and discuss the results with them. Be sure they understand the policy and their responsibilities. Select those with the right skills and right tasks for telework. If you deny an application, have good business reasons for doing so. Explain to the employee why their application was denied and what would have to change for it to be approved.
- **Discuss Expectations:** If you are concerned that work won't get done at home, set clear expectations and identify specific deliverables with timelines. Discuss how the employee will report their progress.
- **Treat all Employees Equitably:** In terms of expectations and work assignments, treat teleworkers and in-office employees the same. Failure to do so will create resentment in the ranks. When you make rules, try to make ones that apply equally to all employees.
- **Trust Your Employees:** Once you've discussed your expectations, trust your employees to do the work. As they succeed, your trust in them will build.
- **Model Expected Behavior:** Demonstrate integrity, respect and trust. If managers don't model that behavior to employees, teleworking is not likely to be successful. Treat employees as professionals and expect professionalism from them.
- **Support Your Employees:** Document your employee's successes, so you can validate the program. There may be times when you will need to run interference for your teleworkers, such as when they aren't getting the IT support they need.
- **Evaluate based on results:** Look at the work product to make evaluations. Is the quality of the work good? Is it completed on time? If employees fall short of your expectations in any area, work with them to improve. Be specific about what they need to change.

- **Communication is Key:** Just because employees are at home, it doesn't mean they are out of reach. Communicate freely, provide feedback, and encourage communication between team members regardless of where they are.
- **Embrace Technology:** Use the simple communication tools (phone, email, instant messaging) yourself and encourage their use among both teleworkers and in-office employees. Explore collaboration tools, like audio and video conferencing. Telework is largely technology-driven and technology isn't going to retreat.
- **Maintain the Team:** Coordinate staff meetings and teleworker schedules. Teleworkers may have to rework their schedule to come in for the meeting. The work of teleworkers is still part of the overall work plan and should be discussed as such. Include teleworkers in events to preserve team cohesion and allow for social interaction. When you talk to teleworkers, ask if they are feeling isolated. If so, you may want to limit the number of days they telework.
- **Monitor the Effect of Telework on Non-Teleworkers:** Selecting teleworkers by their qualifications, equitable work assignments, and open communication should prevent any resentment of teleworkers by their in-office colleagues. Posting teleworker schedules and phone numbers will inform all employees how and where to reach each other. The right tools and discipline, will keep teleworkers from frequently bothering in-office workers to have files emailed to their home. Even with these steps in place, ask non-teleworkers if telework is causing any problem for them. Determine if it is a real problem or a perceived problem and address it.
- **Be Flexible:** Employees are not all alike and you may want to tailor the program somewhat to make it better fit individual employees. Make adjustments as needed in how you assign work, set schedules, and monitor progress. Some employees may work best very early or very late, so you may want to allow them to do that, as long as they are reachable at agreed upon times.
- **Don't Over-Monitor:** Don't waste your time or stress your employees with constant check-ins or automatic computer monitoring. It's counterproductive.
- **Don't Forget Security:** Make sure employees understand any equipment or information security policies. Establish good practices regarding the removal of information from the office, either physically or electronically. These policies and procedures apply to all employees.
- **Don't Expect Every Employee to Succeed:** If you've given it time, and done your best to support an employee, but telework still isn't working for them, you can terminate the agreement. This isn't a reflection on their value as an employee or your skills as a manager. Some people are just unsuitable for telework.

Evaluating a Request to Telework

All of your employees should know about the telework program. They should also know that there is an application and approval process, and that not every employee that applies will be approved. Employees should have access to your organization's telework policy and any other relevant policies. You may also have minimum requirements; for example, you may require that new employees work in the office for a minimum period of time, say six months, before being eligible for telework. Some managers do this so employees will become familiar with the people and procedures.

Before you interview an employee, make sure they read the Employees Page in the toolkit. This will provide them a good idea of what is involved and their responsibilities as a teleworker.

Ask the employee to complete a self-assessment form. This will help them think through their suitability for telework. You will probably want to review their completed form prior to the interview.

Below are things to look for and some good points of discussion for the interview:

- **Teleworker Motivation:** Find out why the employee wants to telework. If they want to telework so they can take care of preschool children, they may not be a good candidate. On the other hand, some teleworkers schedule a break when kids get home from school, and then return to work later, which may be acceptable.
- **Teleworker Traits:** Most experts agree the following are important characteristics for teleworkers. Don't expect perfection, but discuss where employees may need to work on their skills (the self assessment form comes in handy here). These are only guidelines. Every employee and every job is somewhat unique, so you will have to trust your instincts to some extent. Just because an employee isn't "well organized", for example, may not eliminate them from telework. Your own knowledge of the employee may override what the experts say:
 - Knows their job well enough to work without frequent assistance
 - Is well organized
 - Has good time management skills
 - Is self-disciplined; can work with minimal supervision
 - Is not shy about communicating with colleagues
 - Is familiar with the organization, the culture, and the people
 - Can work alone without feelings of isolation
 - Can establish a work environment at home with minimal distractions
- **Appropriate Tasks:** Discuss with the employee the type of work they will be doing from home. Most employees will have a considerable amount of work that doesn't require them to be in the office, but there are several considerations. Work is not appropriate for telework if:

- It requires a face-to-face meeting (Don't discount video conferencing/web meeting tools, or employees meeting with clients in the client's office)
 - If in-person team interaction is required
 - If the employee doesn't have the appropriate technology and tools in their home office
 - If there is an unacceptable security or confidentiality risk
- **Telework Environment:** Make sure the employee can meet the organization's requirements for a suitable home office. Go over the home office checklist with the employee and discuss what the employee will need to provide. The toolkit's Employee Page includes information about setting up a home office, although the exact requirements may vary by organization.

Once you've determined that an employee can telework, there are several topics you will want to address. These may be covered in training or through one-on-one discussions:

- **Schedules:** Determine a work schedule that considers the employee's preference, but still meets your requirements for accessibility. It's good, whenever possible, to establish regular days and times for each teleworker. It makes it easier on everyone else in the office.
- **Equipment:** Your organization probably has a policy on equipment; what it will provide; what the employee can provide. Within the bounds of the policy, you may be able to make some adjustments to better fit equipment to the needs of individual employees. Some employees may need video conferencing software, while others don't. Some may need a computer with more processing power, while others don't. As much as possible, select equipment that will maximize an employee's productivity.
- **Employee Agreement:** Many organizations require employees to sign a telework agreement. In general, the agreement signifies that the employee understands the terms of the telework policy. Of course, these agreements vary by organization. The toolkit includes a generic agreement.

There are two topics that, while they have particular significance for teleworkers, actually apply to all employees:

- **Security Requirements:** Each organization has different security requirements. These may include computer security, anti-virus software, rules about email, what can be accessed over the organization's network, what can be removed from the office, how computers can or cannot be used, etc. Security training may be appropriate for all employees.
- **Records Maintenance:** This may also be an appropriate training topic for all employees. In addition to an organization's own policy about managing records and confidentiality, different types of organizations are subject to different legal requirements. Employees that work from home are subject to the same rules as those who work in the office.

Turning Down a Request to Telework

If you turn down an employee's request to telework it should be for sound business reasons and those reasons should be well documented. Even an employee who meets all qualifications and would make excellent teleworker may be denied if there are sound reasons for doing so. One reason organizations like to use a printed application for telework is that it provides a place to record the decision and the reason for the decision.

As mentioned previously, employees who apply for telework need to understand that telework is neither an employee benefit nor a right. Telework approval is granted when the employee is right for the job and telework won't be detrimental to the organization. Here are some typical reasons why a telework requests are denied:

- The employee has not been with the organization long enough to know the procedures or the people. You are concerned that if they telework they will have to frequently call you or others back at the office because they don't have the experience to make the right decisions on their own. In this case, give the employee an estimated timeline for when they will be eligible.
- You have determined through your experience with this employee, through their self-assessment, and/or from your discussions with them, that they lack the personal traits suited for telework. Share your concerns and reach an understanding about what they need to improve. Tell them to apply again when they feel improvement has been made.
- If the employee is a mediocre performer, has had poor evaluations in the past, or misses a lot of work, chances are the behavior would continue or get worse as a teleworker. It is also possible that their poor performance is linked to a situation at home that would be solved if they could telework. You should be able to make this determination from the reason they give for applying.
- The employee's work requires constant face-to-face interaction or the use or maintenance of equipment, and that available technology will not enable them to do some of that work remotely. If the employee deals with secure information or materials on a daily basis it may be impossible for them to work remotely.
- The employee doesn't have a suitable environment at home for teleworking. Inform the employee of what needs to change in order for you to approve their application.
- Due to current staffing, the employee is needed for on-site coverage. In this case you should tell the employee when the option to telework might be available.

Make sure the reasons you give for denial are real and documented. Provide the employee with a copy of your reason for denial. Keep a record yourself, as the employee may reapply in the future when they feel the situation has changed. Your HR Department or telework coordinator may also require a copy. Many organizations track applications, approvals, denials, and reasons for denial. Your organization, or the employee's union, may also have a grievance procedure the employee can resort to if they feel the denial was unjustified.

Evaluating Teleworkers

In their annual performance evaluations, teleworkers and non-teleworkers should be evaluated using the same criteria; expectations should be the same for each. Ultimately, teleworkers, just like anyone else are judged by the work they do, not by where they do it.

Most managers, however, review the work of teleworkers more frequently, particularly during the first months. This allows managers to address problems before they become too serious. In addition to reviewing the quality of work, these reviews are intended to evaluate the adjustment to telework. During the application and approval process, the manager may have had concerns about a particular teleworker; concerns about self-discipline, concerns about their ability to meet deadlines, or concerns that their home environment was conducive to work. A review like this is a way to check on any such concerns. Topics to review might include:

- **Work Production:** Are assignments being completed and deadlines met?
- **Work Quality:** Is there any change?
- **Communication:** Have there been any problems reaching the employee? Does the employee returned messages in a timely manner?
- **Technology:** Has the employee had problems with equipment or learning new software? Have they been able to troubleshoot themselves or have they sought help from IT?
- **Work Environment:** Has the employee been able to create a work environment that is relatively free of distractions from family, friends, neighbors, TV, home chores, etc.?
- **Work Habits:** Has the employee settled into a productive work routine?
- **Team interaction:** Is the employee able to communicate effectively with coworkers? Is there any resentment of the employee by in-office colleagues?
- **Isolation:** Are employees having any feelings of isolation when working at home?
- **Satisfaction:** Ask the employee if they are satisfied with their decision to telework.

Consult with IT to learn how frequently teleworkers are requesting IT assistance. Identify if there are common problems that could be reduced with training, or if any particular employees are having more problems than typical.

Keep a record of problems and recommended solutions so you can see if improvement has occurred by the next review. Report problems you discover to the Telework Coordinator. Because the Coordinator receives reports from all managers, he or she may see patterns common to teleworkers that can be addressed in the policies or training.

After evaluating each employee ask yourself if you trust them. Trust is an important component in telework. It's not an all or nothing proposition. How much do you trust this employee to work at home? Would you feel confident if they worked from home more frequently than they do now? Is your trust in them increasing over time? Do you feel they have earned it? If you don't trust them, can you point to specific reasons? Are those issues that can be addressed?

Terminating Telework Agreements

Some employees are just not suited for telework. If their performance suffers after beginning to telework, review the situation with the employee and determine if the poor performance is related to telework or if there is some other cause. If you determine they are having problems with the requirements of telework, discuss this with them and decide if you should give them a chance to improve or if you should cancel the telework arrangement. Keep in mind that for some employees it takes time to adjust to working on their own.

Your Telework Policy should include a clause that allows you to terminate the agreement for poor performance. This should not reflect poorly on the employee if they perform well in the normal work environment. It only means that they are not suited at this time for telework.

Terminating an agreement is easier on both manager and employee if the employee had a clear understanding of the policy, if the manager clearly communicated his or her expectations, and if there were frequent reviews to discuss progress. Terminating the agreement should not be arbitrary or appear arbitrary, or come out of the blue. Some policies provide a notice period to allow the employee to make any arrangements before returning to the regular office schedule. Your organizations may have grievance procedures the employee can use if they felt the agreement was terminated unjustly.