



Telework Guide

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Section I – Background and Purpose

Background

Acknowledging that technological advances have made teleworking a feasible option for many organizations, San Mateo County (County) encourages the use of teleworking as a viable, voluntary option for County employees.

San Mateo County Departments are encouraged to review their operations, if appropriate, and establish a formal telework program for their department, as successful telework programs are tailored to the environment in which they operate.

Purpose

The County has developed a Step-by-Step Telework Guide (Guide) for approving and implementing telework arrangements. The Guide provides general guidance, best practices, and sample documents and forms for teleworking in the County. County Departments may adopt this process – or components of it – when crafting a Program which more appropriately meets their needs.

What is Telework?

Telework is an available option under [Administrative Memo E-9 Alternative Work Schedule Policies \(2013\)](#) which can be used to create a Flexible Work Environment. The County defines telework as ***work conducted by an employee at a work site other than a County office or other County location***. While “telework” and “telecommute” are often used synonymously, telecommute refers to the portion of teleworking that applies to the daily commute. This guide refers to teleworking, not telecommuting.

The County recognizes the benefits of telework, including:

- Boosting employee morale and productivity;
- Promoting options for employees to effectively balance work-life commitments;
- Providing an additional employee recruitment and retention tool and increasing the County’s competitive advantages by positioning the County as “an employer of choice”;
- Boosting employee job satisfaction;
- Reducing absenteeism;
- Increasing the County’s ability to provide essential services during/following an emergency;
- Improving air quality by lowering carbon emissions;
- Reducing traffic and parking congestion; and,
- Maximizing the use of County resources, including office space.

Section II - Departmental Telework Programs

Departmental telework programs (Programs) should identify the functional program areas and staff positions where telework will be both practical and beneficial. All Programs must ensure that the terms and conditions of employment for the teleworker (employee) and the manager/supervisor remain unchanged. Most notably, telework hours, overtime, compensation and vacation schedules must conform to existing County, Departmental and/or telework related policies and procedures, as well as the provisions within the respective [Memoranda of Understanding \(MOU\)](#). A sample Telework Agreement has been created to address many compliance issues, including safety, Worker's Compensation, use of County equipment, and telework costs.

Telework Program Roles and Responsibilities

Below are the standard roles and responsibilities for Department Heads, managers/ supervisors, employees (teleworkers), and the County Human Resources Department, with respect to teleworking in the County.

Department Heads

- Examine Department operations and identify areas where telework will be successful;
- If program requirements and operations allow, establish a Program in the Department which adheres to all applicable County and Departmental policies and procedures;
- Approve or deny (or have designee approve/deny) Telework Requests.

Managers and Supervisors

- Educate prospective and current employees/teleworkers about the Program's policy and procedures;
- Review Telework_Requests and determine, on a case-by-case basis, if the proposed telework schedule will contribute to the County's objectives, while maintaining or improving safety standards as well as the efficiency, productivity, effectiveness of business operations;
- Approve/deny Telework_Requests and ensure necessary training, documentation, and/or verifications are provided;
- Obtain approval of the Department head or his/her designee for all Telework_Requests
- Inform teleworkers that failure to comply with established County and Departmental policies and procedures, as well as Program requirements, may result in termination from the Program;
- Ensure employees who remain in the office are not adversely impacted by telework arrangements;
- Provide specific, measurable, and attainable performance expectations for the teleworker, such as specific assignments, corresponding deadlines, and the quality of the work expected;
- Monitor teleworkers' ability to deliver on performance expectations, assignments, deadlines, as well as quality and quantity of work;
- Periodically review Telework Agreements to ensure compliance with the Program;
- Maintain copies of all signed telework forms/agreements, which may include the following sample documents: Telework Requests, Safe and Effective Telework Environment- Checklist and Self Certification, Telework Agreement.
- Coordinate with department IT and Fiscal staff regarding potential budget impacts (special IT equipment, IT services, etc.)

Employees

- Confirm that current position has been identified by the Department as a position suitable for telework;
- Submit a Telework Request *after* confirming suitability.

When telework is determined to be a viable work option, employees must work with their supervisor/manager to:

- Acquire the skills necessary to meet Department requirements and operate independently from a telework site;
- Establish and maintain an acceptable and safe telework space (Safe and Effective Telework Environment Checklist and Self Certification);
- Develop and follow an agreed upon Telework Agreement and determine how work productivity and performance will be measured;
- Adhere to all County and Departmental policies, and procedures regarding information security;
- Comply with tax laws (The County is not responsible for substantiating a teleworker's claim of tax deductions for operation of a home office used to perform work. Employees should seek advice from a tax advisor concerning home office deductions);
- Maintain the same communication standards applicable within the office environment (i.e. checking voicemails, emails, etc. on a regular basis);
- Report any workplace/security incidents immediately to their manager/supervisor;
- Report any improperly functioning, damaged, lost, or stolen County-issued equipment assigned to the teleworker.
- Record and report all time worked accurately.

Human Resources Department

- Assist County Departments in developing Telework Programs;
- Provide information, resources and tools on Occupational Health and Safety and Ergonomic Office Standards;
- Maintain and update the County's Telework Guide, as needed.

Step-by-Step Telework Guide

The County has developed a Step-by-Step Telework Guide (Guide) for approving and implementing telework arrangements. Departments may adopt this process – or components of it – when crafting their individual Programs. The steps include:

- 1. Determine Areas/Function within the Organization Suitable for Telework**
- 2. Submit Telework Request**
- 3. Complete Telework Training and Establish a Safe Telework Environment**
- 4. Create a Telework Arrangement**

Step One: Determine Areas/Functions within the Organization Suitable for Telework

Departments should determine the areas or functions within their organizations where telework can be a beneficial and practical solution that continues to meet program and operational needs. The identified areas or functions can be a work unit (e.g., In-Home Support Services Unit), or a particular classification (e.g., Social Worker II or III) within a division and/or work unit.

The following criteria can be used to determine if certain positions and the respective responsibilities are suitable for telework.

Telework is not feasible for all positions within a division and suitability is best determined by job functions. Functions that *may work well* in a telework arrangement include:

- Reading, research, writing and editing including communications, charts, planning
- Data analysis, data entry and “number crunching”
- Phone calls
- Participation in conference calls, webinars and computer trainings
- Work typically completed at a desk without special equipment

Functions that *usually do not work well* in a telework arrangement include:

- Client or customer interactions
- A physical presence in a certain location (such as reception or public interfacing)
- Collaborative planning or in-person meetings
- Supervision of employees requiring “in-the-moment” feedback or performance improvements
- Significant face-time
- On-site duties such as photocopying or answering phones

In recognition of organizational changes and advances in remote technology capabilities, Departments are encouraged to annually evaluate their ability to offer a Program. Departments should also regularly review which areas/functions are suitable for telework as changes in classifications, duties, assignments, and projects may impact suitability. Lastly, Departments should make up-to-date information on telework suitability available and communicate any changes to existing policy to staff.

A decision to institute a Program rests with the Department Head.

Step Two: Submit a Request to Telework

Once the Department determines the areas/functions suitable for telework (Step One above) interested employees may submit a Telework Request. Supervisors/managers may also propose a telework arrangement to an employee or group of employees. Please note that a telework arrangement is a mutual agreement between the teleworker and the Department; it is not a forced condition of employment.

Supervisors/managers must also consider the employees' workload, the type of work performed, and the impact a telework agreement will have on fellow colleagues and operations. The Individual and Environmental Assessment (pages 2-3 of the Telework Request) have been developed to assist managers/supervisors in assessing the feasibility of the request.

The County reserves the right to accept or reject a Telework Request. Telework is an option that County management may choose to make available to qualified employees when a mutually beneficial situation exists. It is not a universal employee benefit; employees do not have a "right" to telework and this work option may be terminated by either the employee or the County at any time.

Should a telework request be rejected, the employee may request to meet with the Department Head or designee to discuss the reason for denial. That meeting shall occur within 30 days.

An employee may submit a new Telework Request when the denial reasons provided are addressed and no longer prohibit telework success.

Step Three: Complete Telework Training and Establish a Safe Telework Environment

If the Telework Request is **approved** by the Department Head, the employee and the manager/supervisor may establish a telework arrangement.

The opportunity to participate in a Program is offered with the understanding that an employee is responsible for ensuring that his/her telework environment is both a safe and an effective place of work. The telework environment must comply with all County and Departmental health and safety programs and policies, including but not limited to the [County Occupational Health and Safety Plan](#), [County Ergonomics Program/Policy](#), and Departmental Injury, Illness and Prevention Programs. Failure to do so may be justification for termination from the telework program.

The County encourages Departments to have managers/supervisors and teleworkers review and sign the Safe and Effective Telework Environment Checklist and Self Certification on an annual basis.

Step Four: Create a Telework Agreement

Once the employee and the supervisor/manager have completed steps 1-3 (above), they can draft a Telework Agreement. The County encourages Departments to conditionally approve new telework agreements for a 3 to 6 month trial period. The trial period should allow sufficient time to determine whether a telework arrangement is meeting the needs of the teleworker and the Department.

Once the manager/supervisor has determined that the telework arrangement is effective, the County encourages the approval of Telework Agreements for a period of one year, to be renewed annually going forward. It should be noted that prior approval of a telework agreement does not guarantee future approval.

The Department reserves the right to cancel a Telework Agreement at any time and for any reason. The Telework Agreement can be canceled by the teleworker, the immediate manager/supervisor, the Department Head, and/or the County. Reasons for termination from the telework program can include, but are not limited to, the following:

- Needs of the Department;
- Change in the employee's work function;
- Non-satisfactory employee conduct or performance;
- Non-compliance with the conditions outlined in the agreement signed by the teleworker and Department representative (e.g., Telework Agreement); and/or,
- Abuse of telework privileges.

All County-owned equipment issued to an employee in order to telework must be returned immediately upon the end of his/her telework arrangement.

Other Considerations for Teleworking

Information Security

Security of confidential information is of great importance to the County. Teleworkers, like all County employees, are expected to adhere to all Countywide and Departmental policies and procedures regarding information security. For more information, see the Countywide [Information Technology Security Policy](#).

Supplies, Equipment, and Costs

The costs associated with telework are primarily the responsibility of the teleworker/ employee. However, the County will provide standard office supplies (pens, paper, pencils, etc.) and in some instances may provide equipment or software, if feasible and approved by the Department. Departments are recommended to coordinate with ISD regarding potential charges. Additional information regarding the responsibilities for equipment, software, other services, and maintenance are outlined in the Telework Agreement - Section 2: Telework Standards, Part III - Supplies, Equipment and Costs.

Work Related Injury While Teleworking

In the event an employee suffers a work-related injury while teleworking, worker's compensation laws apply just as they would if such an injury occurred in the office. Employees must follow [County policy for reporting on-the-job Work Injuries](#) by notifying his/her manager/supervisor immediately and completing all necessary documents regarding the injury (i.e. [San Mateo County Incident Report Form](#)).

The County assumes no liability for injuries that occur outside of the performance of the employee's duties and/or outside of the employee's scheduled telework hours. Employees are liable for injuries to third parties (i.e. family members, other non-County employees, etc.) that enter the designated work space.

Section III - Telework Resources

Departments may find the following resources helpful to support the development of a departmental Telework Policy.

Books

- Fenson, William S., and Sharon Hilll. *Implementing and Managing Telework: A Guide for Those Who Make It Happen*. N.p.: Praeger, 2003. Hardcover
- Nilles, Jack M. *Managing Telework: Strategies for Managing the Virtual Workforce*. New York: Wiley, 1998. Print.
- Avery, Christine, and Diane Zabel. *The Flexible Workplace: A Sourcebook of Information and Research*. Westport, CT: Quorum, 2001. Print.
- Johnson, Nancy J. *Telecommuting and Virtual Offices: Issues and Opportunities*. Hershey, USA: Idea Group, 2001. Print.

Section IV - Telework Forms

The following forms available at <https://hr.smcgov.org/telework> have been developed to provide a foundation for Departments in the development of their individualized telework programs.

<p>Telework Request</p>	<p>The employee submits a written request to his/her immediate supervisor, who will determine individual suitability and forward to the Department Head/designated party if the proposal is viewed as having potential for approval. The Department Head/designated party has the final determination.</p>
<p>Safe and Effective Telework Environment Checklist and Self Certification</p>	<p>It is important for all employees to maintain a healthy, safe and ergonomically sound work environment while working in the office or at a remote location. The major difference between the employer's office and the home office is ownership and control over the workplace.</p> <p>All teleworkers and supervisors/managers are responsible for reviewing the Safe and Effective Telework Environment criteria and signing and dating the Checklist and Certification portion of the form.</p>
<p>Telework Agreement</p>	<p>The Telework Agreement verifies that all essential components of a telework agreement have been addressed prior to the start of teleworking. Manager/supervisor or the employee completes the Telework Agreement. The agreements are signed and dated by the teleworker/employee, manager/supervisor and the Department head or his/her designee to demonstrate that all parties have read and understand the Telework Program Standards and Procedures.</p> <p>The Department head or his/her designee has the final decision-making responsibility for approval of a Telework agreement.</p> <p>The Telework Agreement, like the Telework Safety Self Certification, must be reviewed, signed and dated by the supervisor and the employee on an annual basis.</p>