TELEWORK PROGRAM IMPLEMENTATION

A PRACTICAL GUIDE
This manual is intended to be a practical guide to assist individuals and organizations interested in implementing a telework program. The suggestions and activities included in this guide are generic and should be reviewed and tailored to best suit the organization’s requirements. Remember that what works for one company, may not for another. Some of the best suggestions come from networking and talking to other organizations that are currently teleworking. The Internet is another excellent source of information.

1.0 TASK TEAM OR COMMITTEE

Implementing a new program is a large undertaking with many facets to consider. We recommend establishing a telework task team that includes a cross section of individuals within your organization. Each will bring different insight and suggestions, allowing the team to gather as much information as possible. You may want to consider team members from departments such as:

- Human Resources
- Information Technology / Information Services
- Telecommunications
- Finance
- Legal
- Union Representatives
- Managers
- Facility Manager
- Consultant

The number of individuals in your task team will vary depending on the organization’s size and the scope of the program. It is usually beneficial to select one individual as the team coordinator. This individual will keep the rest of the team on track by establishing regular meetings and providing status reports to management. It is important for the team to set clear-cut objectives and deadlines.

2.0 ASSESSMENT

A successful telework pilot or program will begin with up-front planning. There are several assessment tools that can be used to gauge the current overall climate for telework, including suitable job functions, skill level requirements, attitudes of employees and managers, and supporting technology requirements.
When done systematically, the assessment results will help the task team or management identify the resources required for a successful program and develop a plan for program implementation. Teleworker Selection and Assessment tools are located in Appendix A.

2.1 Job Function Assessment

An assessment of jobs, or better tasks with in a job function, will assist employees and manager in determining suitability for teleworking. Some jobs are more suitable for teleworking than others, but when closely examined, some parts of that job may be effectively teleworked.

Remember that teleworking doesn’t have to be a five-day a week arrangement and many individuals may be able to identify tasks appropriate for off-site work one day a week.

It may not be appropriate to automatically identify a job title as either able, or not able, to telework. For example, two employees with the same accounting title may have responsibilities differing enough to allow one employee to telework and not the other. It is important that each employee wanting to telework complete the “Assessing Job Function” worksheet (or a similar form) in Appendix A to determine if they tasks they perform are appropriate for teleworking.

Some jobs/tasks are more easily teleworked than others. If the job depends on stationary equipment (i.e., crane operator, assembly line worker), it will be more difficult to telework these individuals, even on a part time basis. However, with some advance planning and re-scheduling many jobs can be adapted to teleworking. An analysis of work requirements may open up possibilities for teleworking even one day a week. Some of the tasks below may be ideal for teleworkers.

- ✔ work processing
- ✔ financial analysis
- ✔ calculating
- ✔ telephone calls
- ✔ record keeping
- ✔ dictating
- ✔ editing
- ✔ typing
- ✔ graphics
- ✔ maintaining data bases
- ✔ batch work
- ✔ preparing contracts
- ✔ customer service calls
- ✔ design work
- ✔ drafting
- ✔ thinking
- ✔ report generation
- ✔ writing
- ✔ auditing reports
- ✔ preparing budgets
- ✔ computer programming
- ✔ data entry
- ✔ research
- ✔ spreadsheet analysis
- ✔ evaluations
- ✔ consulting with clients
- ✔ reading

When reviewing a job position to see if it's suitable to telework, consider the following:

- Ability to set clear work objectives
- Ability to clearly define tasks for telework day(s)
- Ability to schedule face-to-face interaction on specified days of the week
• Ability to meet internal and external needs while teleworking
• Ability to limit use of on-site stationary resources (i.e., large reference books, files, equipment)
• Ability to control work scheduling
• Ability to benefit from quiet or uninterrupted time

2.2 Employee Assessment

Using an employee assessment tool, like the one “Teleworker Success Profile” in Appendix A, allows managers to objectively look at individuals and job tasks, rather than general categories. The primary goal is to ensure that a newly selected teleworker has a good chance for success.

Employee characteristics probably will not vary dramatically from the office setting to the remote location. For example, if an employee is an organized, efficient worker in the office; then, that same individual will most likely be organized and efficient at the remote location. Likewise, if an employee has poor work habits in the office, they probably will have the same difficulties at the remote location. The personality traits below are good indicators for individual teleworker success.

• Self-motivated and responsible
• Results oriented
• Independent worker
• Understands job requirements
• Understands company policies and procedures
• Successful in current position
• Communicates with supervisor, co-workers, and clients well
• Accepts change easily
• Interested in telecommuting

2.3 Manager Assessment

Selecting job functions and employees suitable to telework is critical to program success. However, equally important is selecting strong managers to administer and monitor the program. Many managers may need to modify the way they supervise employees who telework. Managers may even find that the skills required to supervise teleworkers, work well with on-site employees.

Many managers are accustomed to “observing” productivity – when they can see an employee working, progress must be going on. However, when an employee teleworks, many managers will need to develop other skills to measure the same progress. A good telework manager will learn to manage by objectives rather than sight. Planning is the key here – setting up work plans, schedules, and frequent communications.
The manager assessment tool in Appendix A, “Assessing Manager Style” can assist managers and organizations to determine the level of success a manager will have working with teleworkers.

Strong telework managers have the following characteristics:

- Is able to manage-by-objectives and is results oriented
- Able to establish performance criteria
- Able to plan work efforts
- Has good communications skills
- Is flexible and open
- Promotes subordinate empowerment

### 2.4 Communications Assessment

Using a tool similar to the one in Appendix A, “Communications Assessment,” will assist teleworkers and managers assess current communications patterns and suggest possible changes to accommodate employees on telework days.

In the traditional work setting, a large portion of communications is face-to-face. Teleworkers, their co-worker, and managers will need to make a change in how and when they communicate. Establishing planned communications patterns on telework days increases productivity for all involved. The new modes of communication may include telephone, fax, or e-mail.

Teleworking employees are often encouraged to be diligent about checking voice mail and e-mail. Some organizations require teleworkers be available during core hours, thus increasing access opportunities from co-workers, clients, or managers.

### 2.5 Equipment / Technology Assessment

Within the last five years, technology innovations have made teleworking more feasible for a wider variety of job positions. However, keep in mind that not every teleworker or task requires the latest and greatest technology. Some tasks are successfully performed without the use of technology and tasks may require only a quiet place to read, while others may need all the devices used in the work place – let the task drive the use of technology, not the other way around. Using the form in Appendix A, “Identifying Equipment Needs,” can assist teleworkers to correlate tasks with equipment requirements.

Keep in mind that each organization or business is unique and approach teleworking needs differently. While some organizations purchase hardware and software for teleworkers to use in their home office, other organizations do not.
Within a single department, one teleworker may need only a laptop, but another teleworker may need a laptop, modem, fax/printer and a second phone line.

Remember, the amount and use of technology is based on the tasks to be performed.

3.0 POLICY AND PROCEDURE DEVELOPMENT

The same general policies and procedures that cover staff members working in the office should also apply to staff members who telework. Teleworking does not change compensation, benefits, work status and work responsibilities. Company telework policies should be clearly defined in a written Telework Agreement that is signed by both the teleworker and the manager. Sample telework agreements are in Appendix B. Below are some suggestions for adding to or tailoring your current company policies for teleworking.

3.1 Operational Policies and Procedures

- **Participant Eligibility.** All staff members in good standing may be considered for teleworking. Approval is subject to the operational needs and resources of a department, individual capacity and resources to work independently, task suitability and the availability of appropriate supervision. Supervisors review requests and forward them to Human Resources and telework management team to assess suitability. The telework management team will consider the impacts of teleworking on the work of others inside and outside of their department. Teleworkers must sign a Teleworking Agreement.

- **Schedule.** Teleworkers work off-site per company personnel policies and procedures either during regular company work hours or on schedules that have been agreed upon in advance by teleworkers and their supervisors. Teleworking does not change the amount of time a staff member is expected to work per day or per pay period. Teleworkers are expected to be available by telephone and electronic mail during their scheduled hours and to travel to the office when necessary or optimal for company work or project requirements. Teleworkers need to ensure backup if emergencies cannot be handled from home. Supervisors must review and approve changes to work schedules in advance.

- **Work Week.** Teleworkers will work standard workweek hours and provide a time sheet according to company time recording procedures. They comply with all job requirements that are now in effect in the office. Teleworkers will agree to dedicate their time exclusively to company work activities during scheduled workweek hours. With supervisory approval, teleworking may be combined with a flex-time schedule to allow staff members to work at home during the time that is most productive for them and to compensate for personal interruptions and distractions that may occur in a home workplace.
• **Monthly Work Planning.** Teleworkers must work with supervisors and project (work) team members to establish monthly work plans, ensuring that work is organized so that time and resources are maximized and available to staff working both on-site and off-site.

• **Performance Measurement.** Performance measurement is based on specifically defined criteria that are job related, that focus on key results areas, and are in line with established performance objectives. Performance measurement also compares the level of performance at the remote (home) location with that in the office. Supervisors routinely review teleworking arrangements as part of the review and work planning process.

• **Client/Colleague Support.** Teleworkers must establish work practices that make the teleworking arrangement transparent to clients and colleagues. This ensures the client will not be inconvenienced in their dealings with teleworkers. Management may survey clients to determine if support requirements are being met.

• **Home Office Set Up.** Teleworkers’ at-home workspaces are extensions of corporate office workspace for matters related to safety, materials and equipment, and security of proprietary information. Teleworkers must maintain a designated work area or office at their home. The company will not cover costs related to home office renovations including but not limited to furnishings.

• **Home Office Health and Safety.** Teleworkers agree to maintain safe conditions in their at-home workplace as they would in workspaces on the organization’s premises. Teleworkers agree that, as required by insurance carriers, the company may make on-site announced visits to remote work locations to determine that covered work sites are safe and free from hazards. Teleworkers will complete a Home Office Safety Checklist to ensure that home office set up meets overall safety requirements. The company will continue to be liable for job-related injuries or illnesses that occur in staff members at-home workspace during agreed upon work hours. It assumes no liability for injuries occurring in staff members’ home workspace outside agreed upon work hours or when staff members engage in some non-job related activity. Teleworkers must report all work-related injuries immediately to their supervisor in accordance with company policy and procedures.

• **Work and Family.** The teleworker needs to communicate the Telework Agreement to family and friends, describing their teleworking role and responsibilities to alleviate unnecessary interruptions during the work period. Equipment provided to the teleworker is for performance of work related efforts and not available for use by family or friends.
• **Equipment, Supplies and Service Requirements.** The company will purchase equipment and related supplies for teleworkers’ home offices. Employee-owned equipment may be used with the employee’s consent and company approval. The company shall make all decisions as to the type, nature, function and/or quality of electronic hardware (including but not limited to computers, video display terminals, printers, modems, data processors, and other terminal equipment), computer software, data and telecommunications equipment (i.e., phone lines). The company does not assume liability for loss, damage or wear of employee owned equipment.

The company may make remote office visits to maintain, repair, inspect or retrieve company-owned equipment, software, data and/or supplies. In the event of equipment failure or malfunction, teleworkers agree to immediately notify the out-sourced help desk support to ensure timely repair or replacement. In the event of delay in repair or replacement, or any other circumstance under which it would be impossible to telework, teleworkers understand that they may have to go to a corporate office to work or be assigned other work at management’s discretion.

When necessary for the conduct of its work, the company may specify specific business phone line(s) in teleworkers’ homes and will reimburse the teleworker for business expenses. Teleworkers will ensure that business phone lines are used only for company business.

The company will provide office supplies in accordance with standard procurement and purchasing policies. Reimbursement for out-of-pocket expenses to purchase supplies requires prior approval of the supervisor. The company will not reimburse teleworkers for additional home-related expenses (i.e., heat, electricity, light) created by the teleworking arrangement.

• **Handling and Security of Company Property.** Teleworkers must protect company equipment and supplies from theft, damage, or misuse. Equipment and supplies that are the property of the company must be returned upon request. Company property is primarily for company assignments, but can be used for reasonable personal use providing there is no conflict of interest with your job.

Teleworkers may not duplicate company owned software for use at home and agree to comply with terms of software licensing and company software policy.

• **Handling Proprietary Information.** Teleworkers must handle proprietary information according to the prescribed company policies and procedure guidelines. Teleworkers who wish to take confidential information home or to the remote location require supervisor’s approval.

• **Taxes and Insurance.** Teleworkers are responsible to determine income tax implications for maintaining a home office. The company will not provide tax guidance nor will it assume tax liability. The teleworker is required to work with appropriate company staff to obtain insurance coverage for company equipment while it is located in the designated home office.
3.2 Technology Use Guidelines

3.2.1 Computers --
Most companies use and maintain diverse equipment to support a variety of job functions. Teleworkers use equipment that best suits their job requirements. Supervisor assessment of technical and equipment requirements is critical for supporting a cost-effective teleworking program. The technology requirements depend on the teleworker’s task requirements and related equipment needs at the remote location.

The company assists teleworkers in setting up company owned computers to facilitate teleworking. The set up includes installation of modems, communications software, and other components. It is important for teleworkers to maintain installed hardware and software configurations to ensure continued and stable operations. Personal computer reliability is highly dependent on the interworkings of hardware, operating systems, peripheral devices and software. Individual installation of any new hardware or software components can jeopardize this reliability. In turn, unknown changes to the standard jeopardize tech support ability to provide support. To minimize downtime and support requirements, tech support prohibits modification to components or installation of additional components except by tech support staff.

The teleworker and supervisor determine equipment needs based on job tasks performed in the office and at home. The company will acquire, install, maintain, and repair all equipment.

Teleworker and supervisor responsibilities:

- Teleworkers must use company equipment properly.
- The teleworker’s supervisor is responsible for managing and tracking the effective use of equipment to meet project and department requirements.

3.2.2 Software --
The company has adopted specific application software as its standards for performing business functions.

The company will provide each teleworker access to these software products as needed. To work and collaborate effectively, teleworkers need to use these specific products for company business purposes only. The company is licensed to use these products. Teleworkers are required to protect software from unauthorized use, reproduction, distribution or publication. Teleworkers are prohibited from using other applications for company business.

3.2.3 Communications Equipment --
The company is responsible for the cost of acquiring, installing, maintaining, and repairing in-home phone lines used for business. The teleworker is responsible for making the necessary arrangements.
Communication equipment will be set up in the teleworker’s name. The staff member will ensure the line is used solely for company business purposes.

3.2.4 Phone/Voice Mail --
Teleworking works when contact with the office, customers, and colleagues is maintained. Teleworkers will Call Forward their corporate office telephones to their home office phones when they are teleworking (note: The Call Forwarding feature cannot be activated remotely; teleworkers must forward their phones prior to a teleworking day. When necessary, the company will provide teleworkers an in-home answering machine or a message answering service from the phone company. Voice mail messages, whether in the office or at home, need to be checked on a regular basis.

3.2.5 E-mail --
Electronic mail creates expectations and changes in the manner of communications. Following are general guidelines for use of e-mail:

- If you receive an e-mail that solicits a response, respond with an e-mail unless requested otherwise.
- Always “cc:” people mentioned in your e-mail. E-mail is an excellent way of managing expectations and projects if you forward updates and inquiries to all interested parties.
- Proofread your e-mails before sending them so that the recipient will understand what you are communicating. Ensure it sends the right message and tone.
- Always use discretion when engaging in any e-mail communications. E-mail can be part of a potential “paper trail” when printed by the receiver.
- Label your message “high priority” only when necessary. Recipients will react quickly to your communication if they perceive that your message requires quick response.
- Always be sensitive to the size of files you are transmitting to e-mail recipients. If files are sent to group addresses, limit transmittals to only those who need to see the file.

Teleworkers should establish a specific schedule for checking e-mail during the business day.

3.2.6 Help Desk and Technical Support --
Supervisors and teleworkers need to be aware of all available technical support resources and their availability to the teleworker. All teleworkers should be aware that, in general, tech support will limit its support to company standard equipment and software.
The help desk and technical support will assist remote workers between 8:00 AM and 6:00 PM Monday through Friday. If you can wait more than one to two hours for a solution and can send e-mail, e-mail a description of your problem to the help desk. If you cannot wait for a solution, call technical support with the problem. If you are sent to voice mail, leave a detailed message even if you need help right away. When leaving a voice or e-mail message please include the following:

- Name, date and time, and phone number
- Description of the equipment or software requiring support
- Detailed description of the problem, including error messages, error conditions and the last time the function worked properly. Also identify the task requirements including timeline sensitivity.
- Explain the specific functions that are unavailable to you because of your problem. This will help them devise a work-around if they are unable to resolve the problem.

Teleworkers need to be specific when describing problems for the help desk, citing the following categories of problem severity:

Priority 1 -- User has a deadline and no alternative means for meeting the deadline
Priority 2 -- User has a deadline and awkward alternative means
Priority 3 -- User has no deadline but alternative means are costly
Priority 4 -- User has no deadline and temporary alternatives

The company will pay for repair of company-owned equipment

3.2.7 **Equipment and Data Security** --

Equipment and data are valuable assets. Teleworkers are responsible for following the same security requirements at home as they do in the office. Basic security principles include:

- Teleworkers must protect equipment and data from unauthorized access, use, modification, and destruction.
- Teleworkers are accountable for data security. Teleworkers must keep computer ID, password, and information downloaded to the home computer secure. Passwords should be changed periodically when company sensitive or proprietary information is being stored or accessed.
- Technical support will maintain an inventory of computer equipment components (with serial numbers) used at home. Additional company equipment may be taken from the office for temporary use with prior approval.
- Teleworkers will not take proprietary or confidential materials home without supervisory approval.
- Tech support will provide each teleworker with virus-scanning software. Teleworkers must agree to use this software as directed.
4.0 TRAINING

When transitioning from a traditional work environment to a telework environment, it is important that all participants receive some level of training – this includes managers as well as teleworkers. Training is essential to participant’s readiness for success.

At a minimum, the training program should include the following topics:

- An orientation to the company purpose and goals for teleworking and telework policies and procedure
- Understanding telework as an alternative work arrangement
- Knowing critical success factors and recognizing telework program barriers
- Telework’s impact on, and the importance of, communications, work planning and scheduling
- Home office set-up and safety precautions
- Effective use of technology
- Security of company equipment, software and data
- Any new requirement for telework-related reports, progress or costs

Training classes may be for employees (teleworkers) only, managers only, or a combined class with both teleworkers and managers. Classes may vary from 2-3 hours to all day.

Appendix C has two training outlines. The examples are for three-hour training classes for managers and employees.

5.0 TELEWORK PROGRAM EVALUATION

It is important to establish a Telework Program Evaluation process to identify program progress. It will allow you to objectively identify problems and issues for correction in a timely manner. Several key points are important for an effective evaluation process.

- Create tools to monitor and measure the program’s progress
- Select key areas for evaluation
  - Telework program documents and guidelines
  - Management and employee views of telework initiatives
  - Work planning, scheduling and productivity
  - Manager, employee, and work-team dynamics
  - Technology effectiveness
- Establish an evaluation schedule for 30 to 45 days after implementation and again at 6 months to 1 year.
Evaluation tools can include:

- Employee/Manager/Coworker surveys
- Client surveys
- Focus groups individual interviews
- Performance evaluations
- Productivity worksheets
- Cost and benefit analysis worksheets

Sample evaluation questions and tools are located in Appendix D.
### OPERATIONAL ASSESSMENT

1. Workplace Assessment

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>a. Office space conducive to shared office?</td>
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<tr>
<td>b. Work team structure conducive to shared office?</td>
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<td>c. Work process conducive to shared office?</td>
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<tr>
<td>d. Shared office meet dept. needs: for collaboration?</td>
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<td>for meetings?</td>
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<td>e. Shared office meet individual needs: for collaboration?</td>
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<td>for socializing?</td>
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<td>for privacy?</td>
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<td>for meetings?</td>
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<td>f. Are budget dollars available for shared office?</td>
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<td>If yes, when?</td>
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What changes need to be made to accommodate shared offices?

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Notes:

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2. Policies and Procedures

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<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>a. Will policies and procedures cover teleworking?</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>b. Is there a telecommuting agreement?</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Will there be?</td>
<td>☐</td>
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<tr>
<td>d. Is there home office safety checklist?</td>
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<tr>
<td>Will there be?</td>
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<tr>
<td>e. Is there a need for separate P&amp;P at dept. level?</td>
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Notes:__________________________________________________________
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3. Job Function Assessment

<table>
<thead>
<tr>
<th>Job Title/function:</th>
<th>ALWAYS</th>
<th>FREQUENCY (% of time)</th>
<th>NEVER</th>
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<tbody>
<tr>
<td>Tasks, functions are project oriented (independently performed)</td>
<td>☐</td>
<td>☐</td>
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<td>Work can be scheduled or time controlled</td>
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<td>Quantity and quality of performance are measurable</td>
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<td>Team work, collaboration required</td>
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<tr>
<td>Need for specialized material and equipment required</td>
<td>☐</td>
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<tr>
<td>Need for face-to-face interaction</td>
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<tr>
<td>Telephone or e-mail sufficient</td>
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</table>
4. Manager Assessment (Critical success factors)

<table>
<thead>
<tr>
<th>MANAGEMENT CHARACTERISTICS</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
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<tbody>
<tr>
<td>Managers support telecommuting</td>
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<td>Manage by objectives and results</td>
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<td>Work planning skills and activity</td>
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<td>Flexibility with work schedules</td>
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<td>Communicate regularly with subordinates</td>
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<td>Coach/council employees regularly</td>
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<td>Trust level with subordinates</td>
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<td>Promotes empowerment</td>
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<td>Open to new ideas</td>
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## 5. Employee Success Assessment

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<tr>
<th>EMPLOYEE CHARACTERISTICS</th>
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<tr>
<td>Demonstrates Self-motivation</td>
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<td>Strong time management skills</td>
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<td>High level of productivity</td>
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<td>Requires minimal supervision</td>
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<tr>
<td>People oriented</td>
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<td>Works well with information and figures</td>
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<td>Level of skill and job knowledge</td>
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<td>Organization skills</td>
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<td>Ability to be flexible</td>
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<td>Attitude toward telecommuting</td>
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6. Job Task and Equipment Inventory

Job:__________________________________________

Rank equipment: Very Important - 1  Somewhat important - 2  Not important - 3

<table>
<thead>
<tr>
<th>Task (by priority)</th>
<th>Off-site</th>
<th>On-Site</th>
<th>Phone/Data Line</th>
<th>PC</th>
<th>Printer</th>
<th>Modem</th>
<th>Fax</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes:__________________________________________________________________________
7. Home Office Requirements

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Do you presently have a home office? or Is there an area conducive for an office?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Will the home office meet safety standards?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Is office furniture conducive for working at home?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Is family situation conducive to working at home?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes:_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

8. Average number of hours worked per day:______________________________

9. Average miles commuted daily:______  Average commute time:___________
TECHNOLOGY ASSESSMENT

1. Describe your job function.

2. How many days per week will you telecommute?

3. Messaging / Communications requirements

<table>
<thead>
<tr>
<th>Managers</th>
<th>None</th>
<th>Infrequent</th>
<th>Moderate</th>
<th>Frequent</th>
<th>Very Frequent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaboration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Workgroup</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Work product / Document</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Transfer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meetings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone calls</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Voice mail</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fax</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4. Do you expect your workday to be different when working at home? How?

**Technology Inventory**

5. What technology do you rely on in the office?

<table>
<thead>
<tr>
<th>PC with office software</th>
<th>Printer</th>
<th>Fax</th>
<th>Copier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modem</td>
<td>Voice Mail</td>
<td>Email</td>
<td>Telephone conferencing</td>
</tr>
<tr>
<td>On-line services</td>
<td>Internet access</td>
<td>Access to Enterprise applications</td>
<td>Multiple phone lines</td>
</tr>
<tr>
<td>Networking OS</td>
<td>Application development tools</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
6. Component descriptions (make/model etc.)

PC

OS/NW (Name/Version)

Printer make/model

Fax (make/model)

Copier (make/model)

Modem (Make, model, speed, type (ISDN, analog))

PC applications used

Enterprise or server-based applications

Application development tools (products)

Email (Name)

Phone/Voice mail system (name)
7. What technology do you expect to require while working at home?

<table>
<thead>
<tr>
<th>PC with office software</th>
<th>Printer</th>
<th>Fax</th>
<th>Copier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modem</td>
<td>Voice Mail</td>
<td>Email</td>
<td>Telephone conferencing</td>
</tr>
<tr>
<td>On-line Services</td>
<td>Internet access</td>
<td>Access to Enterprise applications</td>
<td>Multiple phone lines</td>
</tr>
<tr>
<td>Networking OS</td>
<td>Application development tools</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8. How important is the office connection to achieving your workday output?

<table>
<thead>
<tr>
<th>Not important</th>
<th>Fairly insignificant</th>
<th>Moderately important</th>
<th>Very important</th>
<th>Critical</th>
</tr>
</thead>
</table>

9. Indicate any problems you’ve had with your local PC or PC applications?

<table>
<thead>
<tr>
<th>Windows Lockups</th>
<th>Hard disk failures</th>
<th>Printer problems</th>
<th>Application problems</th>
<th>Modem</th>
</tr>
</thead>
</table>
10. Miscellaneous comments re: telecommuting.
TELEWORK SELECTION CRITERIA

The following will be used as a tool to assess employee and job suitability for teleworking. From this document, develop selection criteria enabling managers to objectively look at individuals and job tasks, rather than general categories. The primary goal is to ensure that a newly selected teleworker has a good chance for success.

Employee characteristics probably will not vary dramatically from the office setting to the remote location. For example, if an employee is an organized, efficient worker in the office; then, that same individual will most likely be organized and efficient at the remote location. Likewise, if an employee has poor work habits in the office, they probably will have the same difficulties at the remote location. The traits below are good indicators for individual teleworker success.

☑ Self-motivated and responsible
☑ Results oriented
☑ Independent worker
☑ Understands job requirements
☑ Understands company policies and procedures
☑ Successful in current position
☑ Communicates with supervisor, coworkers, and clients well
☑ Accepts change easily
☑ Interested in teleworking

Some jobs/tasks are more easily teleworked than others. If the job depends on regular use of office files and resources or requires extensive face-to-face contact with colleagues, it may be more difficult to telework these individuals, even on a part time basis. However, with some advance planning and re-scheduling many jobs can be adapted to teleworking. An analysis of work requirements may open up possibilities for teleworking even one day a week.

When reviewing a job position to see if it’s suitable to teleworking, consider the following:

→ Ability to manage work or staff remotely
→ Ability to set clear work objectives
→ Ability to clearly define tasks for teleworking day(s)
→ Ability to schedule face-to-face interaction on specified days of the week
→ Ability to access and review draft and final reports remotely
→ Ability to meet internal and external customer needs while teleworking
→ Ability to limit use of on-site stationary resources (i.e., large reference books, files)
→ Ability to control work scheduling
→ Ability to benefit from quiet or uninterrupted time

The attached form is designed to help you analyze the teleworking success potential for an individual and job position. Answer the questions as objectively as possible.
Each manager will complete the questions below for every teleworker under his supervision and e-mail/forward the completed form(s) to Jane Doe in Room 111. The purpose is to assess an individual's job characteristics, work habits and competencies for successfully working at a remote location. Fill in responses where appropriate or simply mark with an “X”.

**Employee Name:**

**Job Title:**

**Supervisor Name:**

**Department:**

1. **Provide employee’s responsibilities and potential tasks for telework days.**

The following chart can help you identify tasks suitable for telework and how many days per week they can be performed from the remote location. Review the chart as it relates to tasks and work performed in your group.

<table>
<thead>
<tr>
<th>Tasks Performed</th>
<th>Total number of hours per week normally spent on task</th>
<th>Number of hours per week which could be done at home</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>


Based on your analysis of work activities, estimate the number of days your employees can perform tasks from a remote (home) location.

**Number of days: __________________**

2. Evaluate the following work characteristics according to the employee’s existing job function.

<table>
<thead>
<tr>
<th>Work Characteristic</th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clarity of goals and objectives for this position</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
</tr>
<tr>
<td>Ability to schedule face-to-face contact (meetings, etc.) on certain days of the week</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Degree to which communications can be accomplished using voice mail, e-mail, faxing, electronic file transfer</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Ability to control work flow / schedule</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
</tr>
<tr>
<td>Reliability of technology to support employee when teleworking</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
</tr>
</tbody>
</table>

(Note: If your responses were primarily in the medium to high columns, then this employee is more likely to be a good teleworker.)
3. **Evaluate the employee’s work style and level of performance characteristics.**

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level of job knowledge</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experience on current assignment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Level of organizing and planning skills</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Need for supervision / frequent feedback</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self-discipline regarding work</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reliability concerning work hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Level of productivity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of work product</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Computer literacy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexibility</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Note: If your responses were primarily in the low to medium columns, then this employee is more likely to be a good teleworker.)
(Note: If your responses were primarily in the medium to high columns, then this employee is more likely to be a good teleworker. Your response rating to these questions depends on the critical nature of the work style and performance characteristics.)

3. **Question 3 continued**

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inability to change</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
</tr>
<tr>
<td>Need for interpersonal office contact</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Importance of coworker input to perform job</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
</tr>
</tbody>
</table>

(Note: If your responses were primarily in the low to medium columns, then this employee is more likely to be a good teleworker.)

4. Does this employee work with information, data or materials that require security or other special handling?

   Yes ☐ No ☐

   If yes, what are the requirements and to what extent will this impact telework suitability?
5. When reviewing job tasks of prospective teleworker, answer the following to determine if their job will be suitable for teleworking.

- Ability to manage work or staff remotely
- Ability to set clear work objectives
- Ability to clearly define tasks for teleworking days
- Ability to schedule face-to-face interaction on specified days
- Ability to access and review draft and final reports remotely
- Ability to meet customer/colleague needs while teleworking
- Ability to limit the use of on-site resources
- Ability to control work scheduling
- Ability to benefit from quiet or uninterrupted time

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
6. What is the optimum telework schedule for this employee(s)?

- Once a month
- Once every two weeks
- One day a week
- Two days a week
- Three days a week
- Four days a week
- Full time
- Other (specify)
APPENDIX B

SAMPLE TELEWORK AGREEMENTS
This agreement, effective _____________, is between ______________, and employee (referred to as “Employee”) and ____________________ (referred to as “Employer”).

The parties agree as follows:

Scope of Agreement: Employee agrees to perform required job duties and responsibilities while teleworking. The employee agrees that teleworking is voluntary and may be terminated at any time, by either the Employee or Employer, with or without cause.

Term of Agreement: This agreement becomes effective as of the date designated above, and shall remain in full force and effect, as long as the Employee teleworks, unless the agreement is terminated.

Termination of Agreement: Employee’s participation as a teleworker is entirely voluntary. Teleworking is available only to eligible employees, at the Employer’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. Either party may terminate Employee’s participation in the program, with or without cause, upon reasonable notice, in writing, to the other party. Employer will not be held responsible for costs, damages or losses resulting from cessation of participation in the teleworking program. This Agreement is not a contract of employment and may not be construed as such.

Salary, Job Responsibilities, Benefits: Salary, job responsibilities, and benefits will not change because of involvement in the program. Regular salary reviews will occur As scheduled, and the Employee will be entitled to benefit changes implemented for all employees. The employee will be required to comply with all existing job requirements as now are in effect in the office.

Work hours, Overtime, Vacation: Work hours are not expected to change during the program. In the event that overtime is anticipated, it must be reviewed and approved in advance with the manager, just as any overtime scheduling is normally approved.

Work Plan and Schedule: The daily work schedule for days when working at home is subject to review with and approval by the Employee’s manager. The manager may require that the Employee work defined ‘core hours” and be accessible by telephone during these hours. Employee will identify weekly tasks and schedule by completing a weekly work plan (see Appendix A).
**Equipment:** Employer may provide the necessary computer, modem, software, and other equipment needed for teleworking. All these items remain the property of the Employer and must be returned upon request or at termination of employment. All Employer provided equipment is for Employee assignments only. Other household members or anyone else may not use Employer provided equipment and software. Employer-owned software is specifically licensed and may not be duplicated except as formally authorized. Employer will be responsible for insurance and maintenance of all company-provided materials.

Employee may use personal equipment for teleworking purposes. In such cases, Employee will be responsible for the maintenance and insurance required for the equipment.

If any equipment is inoperable, the employee may be required to return to the office to use other equipment or will make arrangements with their manager on how and when tasks will be accomplished without the availability of equipment support.

**Workspace:** Employee agrees to designate a workspace within their remote location for use while teleworking. Employee agrees to maintain this workspace in a safe condition, free from hazards and other dangers to Employee and equipment. Employer materials related to completion of job assignments must be kept securely in the designated work area and not accessible to others.

The Employee agrees that an Employer representative can make on-site visits (with 48 hours notice) to the remote work location for the purpose of determining that the site is safe and free from hazards and to maintain, repair, inspect, or retrieve Employer-owned equipment, software, data, or supplies.

**Office Supplies:** Office supplies will be provided by Employer as needed. Employee’s out-of-pocket expenses for other supplies will not be reimbursed unless by prior approval of Employee’s manager.

**Worker’s Compensation:** Employer will be responsible for any work-related injuries under the state’s Worker Compensation laws. This liability is limited to injuries resulting directly from work and only if the injury occurs in the designated work area. All claims will be handled according to the normal procedure for reporting and documenting Worker Compensation claims.

**Liability for Injuries:** Employee understands that Employee remains liable for injuries to third persons and/or members of Employee’s family on Employee’s premises. Employee agrees to defend, indemnify and hold harmless the Employer, its affiliates, employees, contractors and agents, from and against any and all claims, demands or liability (including related losses, costs, expenses, and attorney fees) resulting from, or arising in connection with, any injury to persons (including death) or damage to property caused, directly or indirectly, by the services provided herein by
Employee or by Employee’s willful misconduct, negligent acts or omissions in the performance of the Employee’s duties and obligations under this Agreement, except where such claims, demands, or liability arise solely from the gross negligence or willful misconduct of the Employer.

**Dependent Care:** Teleworking is not a substitute for dependent care. Teleworkers will not be available during company core hours to provide dependent care.

**Taxes and Insurance:** It is the Employee’s responsibility to determine tax and insurance implications of maintaining a home office area except in the case when Employer equipment is being used which will be insured by the Employer. The Employer will not provide tax guidance nor will it assume additional tax liabilities. Employees are encouraged to consult with their tax accountant and insurance broker to discuss these implications.

**Evaluation:** Teleworker agrees to participate in all studies, inquiries, reports, and analyses related to the telework program.

The Employee remains obligated to comply with all of the Employer’s rules, practices, instructions and this Agreement. The Employee understands that violation of any of the above may result in termination of the telework arrangement.

I understand and will comply with all telework policies and procedures and the Agreement so long as I am an active teleworker employed by .

____________________________  Date  
Employee Signature  

____________________________  Date  
Manager Signature
WEEKLY WORK PLANNING FORM

Weekly Tasks:
1. 
2. 
3. 
4. 
5. 
6.

<table>
<thead>
<tr>
<th>Task Priority #</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

Remarks: ________________________________________________________________

______________________________________________________________

______________________________________________________________
APPENDIX B

HOME OFFICE SAFETY CHECKLIST

Home office safety is a PRIORITY. The following checklist identifies critical considerations when setting up your designated office.

OUTLETS, ELECTRICAL CORD AND PLUGS

- Electrical outlets are grounded.
- Cords and plugs have three wires/ prongs.
- Interconnecting cables are out of the way, tied together, or covered to minimize the danger of tripping over them and reduce amount of dust they hold.
- Never allow cords to interfere with machine operation.
- Ensure that plugs are locked or securely inserted into the outlets.
- Use surge protector or master switch. Do not overload extension cords or outlets.
- Periodically inspect all cords and plugs. Repair or replace them immediately when problems are identified.

TELEPHONE CORDS AND CABLES

- Ensure that cords are behind desks and tables so there is no danger of tripping over them.
- Ensure that cord does not interfere with machine operation.
- Ensure that phone is easily accessible in designated office area.

EQUIPMENT AND MATERIALS

- Heavy items are on secure stands and are child-proofed.
- Equipment is placed near the wall and away from walkways and doors to prevent from tripping or bumping into it.
- Keep ashes and liquids away from the equipment.
- Keep materials filed or on shelves and out of the way. Store heavier materials in bottom drawers of filing cabinets.

DESKS, TABLES, AND FILING CABINETS

- Desks, tables, and filing cabinets are placed near the walls and away from walkways and doors.
- Cabinet and desk drawers are closed when not in use.
- When using your computer, ensure that the desk or table height is approximately 27 to 39 inches from the floor, allowing your forearms to be parallel to the floor and wrists straight. Leave space in front of your keyboard for the heels of your hands to rest while you are keying.
☐ Ensure working surfaces are smooth and free of sharp and jagged edges.
☐ Inspect desks and tables to ensure that joints and screws are tight.

CHAIRS

☐ Chair should allow you to sit comfortably erect.
☐ Inspect backrest, arms, sides, and casters of chair to ensure that they are secure and have the proper tension.
☐ Ensure that the seat height is 16 to 22 inches (depending on your height).
☐ Ensure that chairs are free of sharp or splintered edges.

My home office meets the established safety items above.

__________________________   __________________
Signed       Date
APPENDIX C

TRAINING MODULE OUTLINES
The table below shows a basic training approach for managers.
The following training curriculum reflects a three-hour session.

<table>
<thead>
<tr>
<th>Module 1</th>
<th>Introduction. Reviews the workshop agenda and administration instructions. We discuss organization’s objectives for the telework program and review related policy and procedure guidelines that support program implementation and management.</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>10 minutes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Module 2</th>
<th>Introduction to Telework. Gives participants an overview of telework as an alternative work arrangement. Introduce participants to culture and relationship changes brought about by teleworking. Interactive training begins with small group dialogue on specific questions, introducing participants to the principles of establishing and managing telework arrangements.</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>30 minutes</td>
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</table>

<table>
<thead>
<tr>
<th>Module 3</th>
<th>Success Factors and Barriers. Facilitates discussions on the business, organization and employee advantages of teleworking. Review potential barriers affecting the implementation of telework arrangements. Participants prepare for group discussion by completing success factor and barrier worksheets. Provides an approach and practical methodology for establishing and managing telework arrangements.</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>20 minutes</td>
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<table>
<thead>
<tr>
<th>Module 4</th>
<th>Managing Telework Arrangements. Review key principles and techniques for effectively managing telework arrangements. Emphasize setting employee performance standards that support organizational goals. Participants complete a Job Performance Management Worksheet that identifies baseline output expectations, discrete performance measurement, and expected results for specific job tasks. Use this worksheet later in this module to develop work planning guidelines. Effectively applying management by results principles is a key success factor for managing in a telework environment. Focus on the concept of defining desired results that are measurable and have targets for completion. In a small group exercise supporting this principle, participants develop work plan guidelines and set up a process for obtaining agreement with their employee. The Job Performance Management Worksheet developed early in the workshop is a guide for this exercise. As part of this module, we review the use of performance measurement tools to identify the impact of the flexible work arrangement on employee and work team productivity. Monitoring</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>40 minutes</td>
</tr>
</tbody>
</table>

*continued on the next page*
### Module 4 (cont’d)

Performance changes are critical. Training should support the concept of building performance measurement on the basis of established performance standards. Using the Job Performance Management Worksheet, guide participants through identifying key areas of employee and work team performance that managers measure on the basis of defined results. This discussion includes principles for providing employees and work team with timely feedback and coaching when performance changes.

### Module 5 “Nuts and Bolts” of Managing a Telework Arrangement

This module provides participants with basic tools and techniques to effectively manage telework arrangements. Provide guidelines to participants for assessing critical success factors. These include: manager, employee, job function, and home office (for teleworker) suitability; periodic program evaluation considering productivity, costs, benefits, and impact on work team and clients; and work/life balance issues. This discussion reviews the concept of weekly planning with employees and meeting schedules that support departmental needs. ARCCA provides specific guidelines on establishing a program implementation action plan and designing and initiating a flexible workplace program evaluation.

### Module 6 Manager-Telecommuter and Work Team Dynamics

This module focuses on changing dynamics between manager, employee, and work team in a telework environment. Review key factors in establishing quality relationships through effective planning and communications strategies and the practice of employee trust and empowerment. Participants complete a communications planning exercise. Facilitate a role playing exercise that uses principles of effective employee/manager working relationships.
The table below shows a basic training approach for employees (teleworkers). The following training curriculum reflects a three-hour session.

<table>
<thead>
<tr>
<th>Employee (Teleworker) Training Curriculum Outline</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Module 1</strong> <strong>Introduction.</strong> Review the workshop agenda and administration instructions. Discuss organization’s objectives for the telework program and review related policies and procedures that support program implementation.</td>
<td>20 minutes</td>
</tr>
<tr>
<td><strong>Module 2</strong> <strong>Success Factors and Barriers.</strong> Facilitate discussions on the organization and employee advantages of telework arrangements. Discuss culture and relationship changes brought about by teleworking. Review potential barriers affecting the implementation of telework. Participants prepare for group discussion by completing success factor and barrier worksheets. Provide a systematic approach for developing a rationale and proposal for telework arrangements. Discuss the establishment of “up front” goals and guiding principles to ensure that employees take a responsible and effective approach to completing job requirements in a telework environment.</td>
<td>40 minutes</td>
</tr>
<tr>
<td><strong>Module 3</strong> <strong>Getting Started.</strong> Identify key principles for establishing and maintaining a successful program. Participants complete a Task Suitability Worksheet as an exercise to confirm task suitability for teleworking. In addition, they will complete an Employee Profile Assessment that will confirm their potential to be successful in a flexible work arrangement. Facilitate small group discussions that focus on proposing flexible work arrangements with the manager.</td>
<td>30 minutes</td>
</tr>
</tbody>
</table>
| **Module 4** “Nuts and Bolts” of Working Effectively in a Teleworking Environment.** This module provides participants with basic tools/techniques to organize and manage a telework arrangement. Organization, planning, scheduling, and communicating are critical factors for a successful telework experience. Discuss topics such as:  
  - Understanding employee roles and responsibilities in a changed working environment including the importance of demonstrating responsibility and being flexible in fulfilling job requirements in a changed working environment including the importance of demonstrating responsibility and being flexible in fulfilling job requirements  
  - Using the systematic approach for developing a specific plan and rationale for the telework arrangement  
  - Establishing an arrangement with the manager | 60 minutes |

*continued on next page*
<table>
<thead>
<tr>
<th>Module 4 (cont’d)</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Module 4 (cont’d)</strong></td>
<td>30 minutes</td>
</tr>
<tr>
<td>• Organizing, planning, and scheduling suitable work that fits the telework arrangement and work team interaction requirements</td>
<td></td>
</tr>
<tr>
<td>• Developing a communications plan that fosters good manager and work team interrelationships</td>
<td></td>
</tr>
<tr>
<td>Review techniques for developing a periodic work plan (weekly, monthly) and schedule that fits the telework arrangement, including core hours. In small groups, participants, acting as a work team, will use a work planning exercise to discuss the process of coordinating and scheduling work activities. Discuss productivity and performance appraising in the changed working environment.</td>
<td></td>
</tr>
<tr>
<td>Provide tips and safety rules for setting up a home office. Participants complete a teleworker profile Job Task and Equipment Inventory Worksheet to identify task suitability for teleworking and equipment and support requirements for each task. Provide tips for the effective use and security of technology. Review the communications techniques for phone, voice mail, e-mail, and help desk use.</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Module 5 Employee, Manager and Work Team Dynamics</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Module 5 Employee, Manager and Work Team Dynamics.</strong> This module focuses on changing dynamics between the employee, manager, and work team in a telework environment. Review key factors in establishing quality relationships through effective communications, strategies and soliciting the cooperation and support of the manager and work team. Participants complete a communications planning exercise.</td>
<td>30 minutes</td>
</tr>
</tbody>
</table>
APPENDIX D

EVALUATION TOOLS
TELEWORK PROGRAM EVALUATION
KEY POINTS FOR MANAGERS & TELEWORK EMPLOYEES

The following are key areas to review in monitoring and evaluating the effectiveness of the Telework Pilot Program.

TELEWORK POLICIES AND GUIDELINES
− Did the Telework Guidelines provide you with adequate information to begin the telework program?
− What additional information do you think should be added to the Telework Guidelines?

RESOURCES
− Were you able to access required resources that are available in the office (identify those that were difficult to access)?

EQUIPMENT
− Identify importance of equipment, software, and materials to do the job remotely. What was lacking that prohibited effective completion of tasks?
− What equipment was used when working remotely? What equipment could have been used to make task completion more effective?
− What are the equipment problems you have experienced?
− Have you set up designated office space at home? Does your home office work space work well for you? Identify problems and how have you resolved them?

SUPERVISION
− Do you supervise Telework employees and their coworkers? How effective are you in supervising on Telework days?
− How supportive of telework is your supervisor?
− Does your supervisor recognize the advantages and disadvantages of telework?

COMMUNICATIONS
− How often were you able to communicate with your supervisor or coworkers? Were communications curtailed because of Telework?
− Have the patterns of communication changed? How?
− Has the relationship with your supervisor or work team changed? How?
TEAMWORK
- When working on projects with coworkers, how difficult was it to coordinate your work activities? How did Telework effect this working relationship (quality)?
- How does telework fit in your work group?
- How do your coworkers and support staff feel about Telework? Does it create any advantages or disadvantages for them?

PLANNING
- Did you plan your work for yourself and/or manager on a regular basis?
- Did you plan or coordinate in advance with your work team?
- How often?

PRODUCTIVITY
- How many hours per day do you work at the office compared to the day that you are Teleworking? How many hours do you Telework after business hours or on weekends?
- How have you managed the way you do your job to facilitate Telework?
- How has telework affected your productivity and quality of work?
- Are you more productive working at home than you are in the office? If so, how much more by percentage?
- Has there been any change in the workload of non-Telework employees, either coworkers or support staff? If yes, how were the changes handled?

PERFORMANCE
- Have you (potentially) enhanced your skills by Teleworking? What areas have changed or you think will change?
- In what ways has Telework improved your job?
- What effect do you think Telework has on the organization?
- What would you change in what you have done while Teleworking?
- How has Telework changed your work skills? What is the potential for you increasing your work skills as a result of Telework?

TRAINING
- Has the Telework orientation and training been sufficient?
- What areas need more coverage?
**SCHEDULING**
- What was the Telework schedule that you followed?
- What factors caused you to change your Telework schedule? How often did it change?
- Was it necessary for you to attend meetings on your normal Telework days? How well did this work?
- How often did your Telework schedule change due to a lack of access to appropriate services, equipment or software?

**TECHNICAL SUPPORT**
- What technology problems have you experienced?
- When you have requested assistance, has the help desk been responsive? What other assistance have you needed and has it been available?
- While setting up your home office, did you incur any technical start-up problems? How were those problems resolved?

**SPACE USE**
- What has been the change to your central workspace as a result of Telework?

**COST/BENEFITS**
- What dollar costs have you experienced or noticed? Savings?
- What are the most important advantages to your Teleworking? Disadvantages?
- What benefits have been derived from Teleworking? Unexpected benefits?
- What have been the most significant advantages of Teleworking to you family? What have been the disadvantages?

**COMMUTE ISSUES**
- How many miles do you commute to the office one way?
- How much time does it take you to commute one way to the office?
- Has Telework changed your commute habits on those days that you come in to the office?

**PERSONAL**
- When Teleworking, did you feel isolated or disconnected from your supervisor? Coworkers? Services?
- Is the office more stressful than working at home and, if so, why?
- Is your family supportive of Telework?
- Were you able to handle necessary errands more effectively while Teleworking?
- How did you get in the right frame of mind to work at home?
- What changes has Telework made to your professional life? Your personal life?
- Do you wish to continue Teleworking?
PROBLEM ISSUES AND SUGGESTIONS
– What are your biggest challenges and problems with Telework and how have you solved them?
– What tips would you suggest to future Telework employees?
– Please record any concerns or suggestions you have not covered elsewhere in this evaluation.

WORK AND FAMILY BALANCE
– How did Telework make a difference in your ability to balance work and family responsibilities?
– Did you experience interruptions at home that created more problems than when you are in the office? What were they or how significant?
TELEWORK EVALUATION SURVEY (TELEWORK EMPLOYEE)

Telework employees will complete this survey. Check all responses that apply. Write additional responses and clarifications on the back of the survey forms.

1. What is your primary purpose or reason for Teleworking?
   ____________________________________________
   ____________________________________________
   ____________________________________________

2. What is your job function? ____________________________________________

What specific tasks do you do while Teleworking and how much time do you spend on each?
   ____________________________________________
   ____________________________________________
   ____________________________________________
   ____________________________________________
   ____________________________________________

3. What aspects of productivity are most important? (Circle one)
   Quantity       Quality       Timeliness of Completion

4. How would you rate your job performance / productivity as a result of Telework?
   Place the appropriate number in the box.

<table>
<thead>
<tr>
<th></th>
<th>Increased</th>
<th>Increased</th>
<th>No Change</th>
<th>Decreased</th>
<th>Decreased</th>
</tr>
</thead>
<tbody>
<tr>
<td>Productivity (quantity)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Work Quality</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeliness of Completion</td>
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<td></td>
<td></td>
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<tr>
<td>Client Support</td>
<td></td>
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<td></td>
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<tr>
<td>Work Team Support</td>
<td></td>
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</tr>
<tr>
<td>Overall Performance</td>
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<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
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</tbody>
</table>
Overall increase in productivity? ___ %   ___ %   ___ %   ___ %

5. What is the basis of your response on these changes in productivity? Or is your response based on empirical measurement of productivity?
6. In what specific way has Telework improved your job? Specifically describe how this has impacted your productivity, quantity, quality, and/or timeliness of completion.

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

7. In what specific ways have you changed the way you do your job to facilitate Teleworking? In what specific way has it effected productivity?

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

8. Has there been a change in the workload and productivity of either coworkers or support staff?

<table>
<thead>
<tr>
<th>Coworkers</th>
<th>Support Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes (how – be specific to include what and How much)</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

9. Typically, how many hours a day do you ....?:

<table>
<thead>
<tr>
<th></th>
<th>Work in the office</th>
</tr>
</thead>
<tbody>
<tr>
<td>____________ hours</td>
<td>Work on a Telework days</td>
</tr>
<tr>
<td>____________ hours</td>
<td>Work after business hours (in the office)</td>
</tr>
<tr>
<td>____________ hours</td>
<td>Work after business hours (on Flexipalce days)</td>
</tr>
<tr>
<td>____________ hours</td>
<td>Work on weekends (in the office)</td>
</tr>
<tr>
<td>____________ hours</td>
<td>Work on weekends (Teleworking at home)</td>
</tr>
</tbody>
</table>

10. Have you had to alter your scheduled day at the home office to accommodate a business necessity at the worksite office? How often does this occur? Was this related to a production issue? If so, what was it?

| Yes (how often) | |
| No | |
11. On days that you are Teleworking, how would you rate the lines of communications in the following areas?

<table>
<thead>
<tr>
<th>Your ability to:</th>
<th>Excellent</th>
<th>Very Good</th>
<th>Good</th>
<th>Meets Minimum Reqmts</th>
<th>Needs to Improve</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reach supervisor when necessary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coordinate with coworkers</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Initiate new tasks/projects</td>
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<tr>
<td>Follow-through on projects</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access support staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to help desk</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

12. Indicate the importance of the support equipment below for task completion. Add equipment not listed but important on the “Other” line.

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Very Important</th>
<th>Somewhat Important</th>
<th>Not Important</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal computer</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephone for voice communications</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dedicated phone line for modem</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fax machine</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Answering machine / voice mail</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printer / copier</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to networked computers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Same software used in the office</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Other __________________________</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

13. On those days that you Telework, how often do you use the following communication tools?

<table>
<thead>
<tr>
<th>Communication Tool</th>
<th>0 times a day</th>
<th>At least once a day</th>
<th>2-4 times a day</th>
<th>5-8 times a day</th>
<th>9-10 times a day</th>
<th>10+ times a day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fax</td>
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<td></td>
</tr>
<tr>
<td>E-mail</td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
14. On those days that you Telework, how often do you need remote access?

<table>
<thead>
<tr>
<th>Hours a Day</th>
<th>0 hours a day</th>
<th>1-3 hours a day</th>
<th>4-6 hours a day</th>
<th>6-8 hours a day</th>
<th>9-10 hours a day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes (list)</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
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</tbody>
</table>

15. Did you encounter equipment, technical setup or startup problems when establishing the designated office at home? Was the productivity affected by start up problems?

- [ ] Yes (list)  
  _____________________________________________________________
- [ ] No  
  _____________________________________________________________

16. What equipment problems did or do you experience? How were the problems resolved? How long did it take? How was productivity affected – be specific?

________________________________________________________________
________________________________________________________________
________________________________________________________________
________________________________________________________________

17. What additional costs do you attribute to Telework? How much?

________________________________________________________________
________________________________________________________________
________________________________________________________________
________________________________________________________________

18. Has Telework impacted you dependent (child) care arrangements? If so, how?

________________________________________________________________
________________________________________________________________
________________________________________________________________
19. What effect do you think Teleworking has on the organization?


20. Additional comments:


Managers of Telework employees will complete this survey. Check all responses that apply. Write additional responses and clarifications on the back of the survey forms.

1. How would you rate the Telework employee’s job performance / productivity as a result of Teleworking?

<table>
<thead>
<tr>
<th>Productivity (quantity)</th>
<th>Increased Substantially</th>
<th>Increased</th>
<th>No Change</th>
<th>Decreased</th>
<th>Decreased Substantially</th>
</tr>
</thead>
<tbody>
<tr>
<td>How much?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>__ %</td>
<td>__ %</td>
<td>__ %</td>
<td>__ %</td>
<td>__ %</td>
</tr>
</tbody>
</table>

Work Quality
Timeliness of Completion
Communications Skills
Ability to Work Independently
Client Support
Interpersonal Skills
Organizational Skills
Overall Performance
Other _______________________

2. What aspects of productivity are most important? *(Circle one)*

- Quantity
- Quality
- Timeliness of completion

3. What is the basis of your response on these changes in productivity? Or is your response based on empirical measurement of productivity?

____________________________________________________________________________________

____________________________________________________________________________________
4. In what way has Telework improved your employee’s job?


5. What affect do you think Telework has on the organization?


6. How has the Telework employee changed the way they do their job to facilitate Teleworking? How has this affected productivity?


7. Has there been a change in the workload and productivity of non-Telework employees, either coworkers or support staff?

   □ Yes  □ No

   If yes, describe the change.


8. Typically, how many hours a day does the Telework employee:

   ___________ hours Work in the office
   ___________ hours Work on a Telework day
   ___________ hours Work after business hours (in the office)
   ___________ hours Work after business hours (on Telework days)
   ___________ hours Work on weekends (in the office)
   ___________ hours Work on weekends (Teleworking at home)
9. On days that your employees are Teleworking, how would you rate the lines of communications in the following areas?

<table>
<thead>
<tr>
<th>Your ability to:</th>
<th>Excellent</th>
<th>Very Good</th>
<th>Good</th>
<th>Meets Minimum Reqmts</th>
<th>Needs to Improve</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reach employee when necessary</td>
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<tr>
<td>Coordinate with coworkers</td>
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<tr>
<td>Initiate new tasks/ projects</td>
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<tr>
<td>Follow-through on projects</td>
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<tr>
<td>Access support staff</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Access to help desk</td>
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</tbody>
</table>

10. Have you been able to effectively supervise your employees on the days they Telework?

☐ Yes   ☐ No

If yes, describe why you have been effective

______________________________________________________________________________

______________________________________________________________________________

If no, describe why you have not been able to effectively supervise your Telework employees

______________________________________________________________________________

______________________________________________________________________________

11. On those days that your employee Teleworks, how often do you communicate with them?

<table>
<thead>
<tr>
<th></th>
<th>At least once a day</th>
<th>2-4 times a week</th>
<th>About once a week</th>
<th>About once a month</th>
<th>Less than once a month</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone</td>
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<td>Fax</td>
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<tr>
<td>E-mail</td>
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</tr>
</tbody>
</table>
12. Have you had to alter the Telework employee’s scheduled day at the home office to accommodate a business necessity at the worksite office?

☐ Yes  ☐ No

If yes, how often does this occur? Is it related to a productivity issue? Other reasons?

________________________________________________________________________

________________________________________________________________________

13. Did your Telework employee encounter equipment, technical setup or startup problems when establishing the designated office at home? Was productivity affected by start up problems?

☐ Yes  ☐ No

If yes, list problems.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
14. What other equipment problems did the Telework employee experience? How were the problems resolved? How long did it take? How was productivity affected?

________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________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