



Judicial Council of California · Administrative Office of the Courts

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REPORT TO THE JUDICIAL COUNCIL

For business meeting on February 26, 2013

Title	Agenda Item Type
AOC Restructuring: Amendments to Policy 8.9, Working Remotely (Telecommuting)	Action Required
Rules, Forms, Standards, or Statutes Affected	Effective Date
None	February 26, 2013
Recommended by	Date of Report
Steven Jahr Administrative Director of the Courts	February 11, 2013
	Contact
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Executive Summary

The Administrative Director of the Courts requests that the Judicial Council consider and approve one of the following options concerning telecommuting. In addition, the Administrative Director confirms that all 85 telecommuting staff are currently in compliance with the existing policy and has prepared a report containing options for consideration by the Judicial Council. The report contains options to: (1) eliminate all forms of telecommuting; (2) eliminate regular telecommuting and only allow for limited ad hoc telecommuting under special circumstances; or (3) permit telecommuting by approving a restructured and more restrictive telecommute policy, which contains controls for approving, monitoring, and, if necessary, rescinding participation. If the revised telecommute policy is approved, a follow-up report will be provided to the Judicial Council in one year.

Previous Council Action

In August 2012, the Executive and Planning Committee (E&P) recommended that the Judicial Council direct the Administrative Director of the Courts to require compliance with the requirements and policies of the *AOC Personnel Policies and Procedures Manual*, including compliance with the rules limiting telecommuting, specifically concerning Policy 8.9 Working

Remotely (Telecommuting). As a response to that directive, the Administrative Director confirmed that all 85 telecommuting staff are in compliance with the existing policy and, in consultation with the AOC Executive Office and office directors, proposed amendments to the policy to address implementation and compliance concerns stated in a report presented by E&P to the council at its August 31, 2012, meeting.

At its December 2012 meeting, E&P further proposed an amendment to Judicial Council directive 26 to enlarge its scope to include the question of whether a telecommute program should remain in force. The proposed revisions to Policy 8.9 and options outlined in this report respond to the amended directive for discussion at the council’s February 2013 meeting.

Current Status

There are 85 regular employees in compliance with the current Policy 8.9 who have been approved for telecommuting within the AOC. The chart below lists the eight AOC offices that currently participate in the program.

Participating Offices	Count of Participating Employees	% of Total AOC Population
Center for Families, Children & the Courts	27	3.76%
Center for Judiciary Education and Research	11	1.53%
Court Operations Special Services Office	9	1.25%
Criminal Justice Court Services Office	3	.42%
Information Technology Services Office	19	2.65%
Judicial Council Support Services	1	.14%
Legal Services Office	11	1.53%
Trial Court Liaison Office	4	.56%
Grand Total	85	11.84%

The following ten offices do not currently participate in the regular telecommuting program.

Non - Participating Offices		
Judicial Branch Capital Program Office	Office of Communications	Special Projects Office
Fiscal Services Office	Office of Governmental Affairs	Trial Court Administrative Services Office
Human Resources Services Office	Office of Security	
Office of Administrative Services	Office of Real Estate & Facilities Management	

Of the 718 regular employees only 85 regular employees have been approved to participate in the program, representing 11.84 percent of the AOC regular workforce. The remaining 633 regular employees work the standard workweek in an assigned AOC work location.

Duties approved for telecommuting

Office leadership have considered and approved regular telecommute schedules depending upon various job responsibilities, including performing legal research, drafting legal opinions, analyzing data, writing reports, and providing network support/administration. Examples of such duties/responsibilities include:

- Legal research to update legal publications, course curricula, and online courses
- Research, data analysis, and report writing connected with advisory committee or other group work
- Configuring, administering, and supporting network and server infrastructure
- Creating lesson plans, developing PowerPoint presentations, and meeting via phone with planning committees
- Writing content for online courses, writing scripts for broadcasts (for both judges and court staff), and drafting reports
- Writing, editing, and generating technical documents
- Preparing and reviewing grant applications, including the preparation of budget sheets and forecasts

Duties not approved for telecommuting

Not all employees have been deemed suitable to participate in the telecommute program due to the nature of the work assigned. Employees who have been deemed ineligible for a regular telecommute schedule include those whose job responsibilities require them to be present in the AOC offices. Examples of such duties/responsibilities include:

- Processing of daily Court-Appointed Counsel compensation claims (which requires specialized software and face-to-face interaction with Accounting staff)
- Handling daily intake of retired judge assignment requests (which requires access to specialized software and constant telephone access)
- Processing of payroll or benefit information (which requires restricted access to the State Controller's Office system) and employee relations interactions (which are best handled in a face-to-face meeting)
- Setting up new computers, delivering them to employees, repairing malfunctioning computers, and processing end-of-life equipment for reutilization/disposal
- Coordinating logistics for judicial education programs (which requires being available to a number of CJER staff)
- Managing the logistics of securing meeting rooms, lodging, and other requirements for education programs and meetings
- Hands-on consulting with other employees in specific subject matter areas, such as instructional design or WebEx support

Additional reasons why employees have not been allowed to telecommute include:

- Employees on a performance improvement plan who require supervision, assessment, and development on site
- Managers and supervisors who need to be available to their staff on as-needed basis

Options for Consideration and Policy Implications

Option 1: Eliminate all forms of telecommuting

If this option is approved by the Judicial Council, Policy 8.9 would be eliminated and telecommuting, both on a regular schedule and on an ad hoc basis, would no longer be permitted in the AOC.

Benefits of adopting option 1

Improved perception/reputation. By eliminating all forms of telecommuting, AOC staff will be available at all times to assist their customers within the Supreme Court, Courts of Appeal, and the trial courts. The AOC has been under public scrutiny to reform and restructure its current practices/policies. Elimination of the telecommuting program enables the AOC to strengthen its reputation with the trial courts and the public.

Ability to supervise employees on site; employee availability. Under a telecommuting program not strictly managed and controlled by a centralized oversight group, there may be a perception of little to no supervision of employees on telecommuting arrangements. By eliminating this option, it eliminates this perception and thereby ensures that all employees on site are properly supervised by their supervisor or manager. Elimination of the telecommuting program will have AOC employees at an AOC worksite on a standard work schedule, with the exception of the one day per month mandatory furlough.

Consistency with most written trial court policies. Most trial courts have not adopted a formal telecommute policy for their employees. Elimination of the policy places the AOC on equal terms with the trial courts and reduces the perception of unavailability.

All offices treated the same regardless of the nature of work. The wide latitude of telecommuting arrangements within the AOC, as allowed under the current Policy 8.9, has resulted in different applications of the policy across all offices. By eliminating the ability to telecommute, employees will be treated the same regardless of their duties and responsibilities.

Challenges of adopting option 1

Reduced motivation potentially leading to reduced performance. The ability to telecommute is a very important job benefit to those who participate in the program. Complete elimination of

the program could result in less-motivated employees, which could have a direct effect on job performance and productivity.

Retention issues—potential for losing quality workforce. In the San Francisco job market most employers, public and private, allow for remote working. If the work from home program is eliminated, it could result in a loss of quality employees to competing employers. It could also influence future ability to recruit quality individuals in a competitive job market.

Employees will perceive this as another take-away. Over the past four years employees have endured several changes in the workplace that have been perceived by the employees as “take-aways.” While many changes have been a direct result of the economic downturn, others, such as this program, are “no-cost” benefits. Removing such a benefit would most likely be perceived by employees as yet another take-away, with a corresponding direct impact on employee morale.

Potential increased commute cost to employees. Employees who currently work remotely are relieved of the time and cost of commuting for the day(s) they work from home. For example, a commuter from the East Bay could save 45 minutes each way to and from work, as well as \$6 to \$10 per day in transportation costs. An individual participating in a one day per week remote work assignment would have an increased cost of \$24 to \$40 per month and will spend approximately 6 additional hours per month commuting.

Ability of the AOC to offer comparable employee benefits in the competitive San Francisco labor market. AOC HR contacted employers within the San Francisco Bay Area to determine what, if any, telecommuting programs they offer to their employees. Of the public entities contacted, the City and County of San Francisco, Superior Court of San Francisco County, San Francisco State University, and University of California, San Francisco offer some form of telecommuting. Of the private entities contacted, Adobe, Charles Schwab, Gap, Inc., and Yahoo! also offer some form of telecommuting. Based on information gathered, it appears that remote working has become a standard practice among major San Francisco employers and is a highly desired benefit of job seekers. To continue to be competitive in the San Francisco labor market, it is critical to develop and maintain programs that meet the business needs of the organization to attract and retain quality staff.

Option 2: Eliminate regular telecommuting and only allow for limited ad hoc telecommuting under special circumstances

If this option is approved by the Judicial Council, Policy 8.9 would be revised to only allow for limited, ad hoc telecommuting not to exceed two days in any given month. In this option telecommuting would only be allowed under special circumstances that would meet the business needs of the AOC. For example, an individual who is on vacation at home and unable to come to the office is required to complete an unexpected project by close of business. That individual could be approved to work from home on that day so the project can be completed and the individual credited with the work time utilized.

Oversight of this option would be granted to office leadership, with monthly ad hoc telecommute reports submitted to the Human Resources Services Office for tracking and review. A quarterly utilization report would be provided to the Administrative Director.

Benefits of adopting option 2

Improved perception/reputation. Elimination of regular telecommuting and the restriction of the program to only include remote work on an ad hoc basis may reduce the negative perception of the AOC telecommuting program. This restriction of the telecommuting program enables the AOC to strengthen its reputation with the trial courts and the public.

Allows for flexibility in meeting critical business needs. While this option does not provide for a regularly scheduled work from home day, it does provide the AOC with the ability to approve limited, one-time, as-needed remote work that would meet a specific, critical business need.

Consistent with some trial court practices. While many trial courts do not have a formal written remote work policy, some trial courts do allow an ad hoc type of work from home program. Some trial courts have allowed staff to work from home to complete a report, a project, and research or data analysis in a quieter, less interrupted setting.

Challenges of adopting option 2

Negative perception/reputation. The AOC has been under public scrutiny to reform and restructure its current practices/policies. Allowing for even ad hoc telecommuting does not completely address the perception that the AOC is unavailable to address trial courts' needs in a timely fashion.

Reduced motivation leading to reduced performance (for individuals who have lost a regular telecommute schedule). The ability to telecommute is a very important job benefit to those who participate in the program. Elimination of the regular remote work program and replacing it with a much more restrictive ad hoc program could result in less-motivated employees and could have a direct effect on job performance and productivity.

Retention issues—potential for losing quality workforce. In the San Francisco job market most employers, public and private, allow for regular remote working. If the work from home program is reduced to an ad hoc program, it could result in a loss of quality employees to competing employers. It could also influence future ability to recruit quality individuals in a competitive job market.

Employees will perceive this as another take-away. Over the past four years employees have endured several changes in the workplace that have been perceived by the employees as “take-aways.” While many changes have been a direct result of the economic downturn, others, such as

this program, are “no-cost” benefits. The severe restricting of such a benefit would likely be perceived by employees as yet another take-away potentially having a direct impact on employee morale.

Potential increased commute cost to employee. Employees who currently work remotely are relieved of the time and cost of commuting for the day(s) they work from home. For example, a commuter from the East Bay could save 45 minutes each way to and from work, as well as \$6 to \$10 per day in transportation costs. An individual participating in a one day per week remote work assignment would have an increased cost of \$24 to \$40 per month and will spend approximately 6 additional hours per month commuting.

Option 3: Permit telecommuting by approving a restructured and more restrictive telecommute policy, which contains controls for approving, monitoring, and, if necessary, rescinding participation in the telecommute program

If this option is approved by the Judicial Council, Policy 8.9 would be revised to the more restrictive policy outlined below.

The proposed Policy 8.9 contains a number of revisions that, if incorporated, address many of the concerns raised. For example, it narrows the scope of the telework policy to nonsupervisory positions, limits the number of days a person can utilize ad hoc or regular telecommuting, and prohibits a combination of ad hoc and regular telecommuting.

Further, to address accountability issues, it includes tracking procedures. AOC employees approved for a regular remote work schedule must complete a remote work log for each day that they work remotely. The remote work log must be provided regularly to the supervisor for review of work progress during remote work days. Additionally, HR would provide a review of the application process and provide recommendations to the Administrative Director or designee for final consideration/approval. This process is designed to ensure that all participants meet and adhere to policy guidelines.

Comparison between current and proposed

The goal is to design a program that is in the best public interest and that benefits the employees, while addressing the challenges identified, i.e., how to measure productivity for the employees who work from home, how to determine what positions are suitable for telecommuting, and how to fairly implement the policy.

The chart below illustrates the differences between the current policy and the proposed policy:

Criteria	Current Policy	Proposed Policy
Employment eligibility	After 6 months of employment	After 12 months of employment
Limits definition of “Home” location	None	Restricts “Home” location to one in the state of California

Limits number of regularly scheduled telecommute days	Up to 8 days per month	No more than 1 day per week in any given week
Limits participation in regular remote work program	None	Limited to only nonsupervisory AOC employees
Limits participation in ad hoc telecommute days	None	Limited to 2 days per month in any given month; available to all AOC employees; not available to employees on a regular telecommute schedule
Consideration/review process	Office leadership discretion	1. Office leadership review, 2. Human Resources review, 3. Administrative Director/designee approval
Factors for approval consideration	Office leadership discretion	Defined consideration factors: 1. Nature of work, 2. Quantity of work, 3. Quality of work, 4. Timeliness, 5. Ability to handle multiple priorities
Approval authority	Office leadership approval	Administrative Director/designee approval
Allowable exceptions	Office leadership discretion	None (except for reasonable accommodations for a disability consistent with law)
Work logs maintained	None	Required for each regularly scheduled remote work day
Tracking of ad hoc telecommute days	None	Tracking required for each day of ad hoc remote work by office leadership and Human Resources
Frequency of productivity monitoring	Annually	Continuing duty of office leadership

The amended policy recognizes the potential benefits of an organized, managed remote work program, and the revisions reflect an emphasis on accessibility, transparency, and consistency. The final amended policy includes two key components that address these themes: availability of staff to address inquiries from internal customers, the courts, and the public; and the assignment of a centralized unit to oversee and manage the telework program.

Benefits of adopting option 3

Increased productivity. Overall productivity may be improved because the more desirable and attractive working conditions result in higher levels of employee motivation. A number of

companies that have implemented telecommuting in the workplace have seen increased productivity in their employees.¹

Work/life balance and employee motivation. Employees perceive the remote working opportunity as a workplace benefit. Employees appreciate and will recognize the efforts by the AOC to maintain attractive work benefits in a challenging economic time.

Work environment. The nature of work appropriate for remote working situations is best served in quiet, uninterrupted settings where quality thinking can occur. The lack of interruptions can not only expedite the completion of a project, but can also increase the quality of the finished product.

Increased monitoring. The utilization of work logs demonstrates the quality and quantity of work performed, which can potentially lead to an increase in productivity.

Employee retention and recruitment. Several employees have expressed that this “benefit” is an important aspect of their decision to be employed at the AOC. In the San Francisco job market most employers, public and private, allow for remote working. This option could allow the AOC to recruit quality individuals in a competitive job market.

Emulates state policies and legislation that encourage utilization of telecommute programs. Government Code section 14200.1(b): “It is the intent of the Legislature to encourage state agencies to adopt policies that encourage telecommuting by state employees.” The standard template for telecommute policy utilized by the state agencies is provided on the Department of General Services website at: <http://www.dgs.ca.gov/dgs/ProgramsServices/telework.aspx>

Challenges of adopting option 3

Perception of monitoring, supervising, and evaluating off-site employees. Under any telecommuting program, there may be a perception of little to no supervision of employees on telecommuting arrangements. Telecommuting may make it more challenging to review the work product on a regular basis to ensure productivity standards are being met.

Limits face-to-face interaction/exchange of information. Working from home could reduce the interpersonal, collaborative relationships necessary for the development of a sound work product.

Impacts on non-telecommuting employees. If regular telecommuting is continued, the AOC will continue to have employees whose job responsibilities prohibit them from participation. For these employees there may be a perception of disparity.

¹ Telework Research Network, “Pros and Cons” (October 22, 2008), www.teleworkresearchnetwork.com/pros-cons (as of Jan. 22, 2008).

Information on current telecommute practices, public and private

The Telework Research Network (TRN) is an independent consulting and research organization that publishes findings related to workplace flexibility. In June of 2011, the TRN published a report entitled *The State of Telework in the U.S.* (see Attachment D),² which integrates a large number of studies, surveys, and censuses to present the current state of telework in the United States. The report encompasses both the private and public sectors, as well as the resulting benefits of telework. According to the report, telecommuting is in much wider use in the private sector than in the public sector. However, use of telecommute (also referred to as telework) programs has increased in recent years in the public sector. A 2011 report also by TRN reviews the benefits and challenges of telecommuting in the California government workforce. While many of the cost-saving considerations would not apply to the AOC, the concept of remaining competitive and attracting a new generation of government leaders and talented staff is a fundamental goal of the AOC.³ (See Attachment E.)

The TRN reports on their website that companies that implement telecommuting policies have seen a notable *increase* in productivity by their employees. Best Buy, British Telecom, Dow Chemical, and many others show that teleworkers are 35 to 40 percent more productive than non-telecommuters. More than two-thirds of employers have reported increased productivity among their teleworkers. Sun Microsystems' experience suggests that employees spend 60 percent of the commuting time they save performing work for the company. JD Edwards teleworkers are 20 to 25 percent more productive than their office counterparts. American Express workers produced 43 percent more than their office-based counterparts, and Compaq increased productivity by 15 to 45 percent.⁴

Because of technological advances in recent years, many employers, especially in the private sector, have found that enabling employees to telecommute has resulted in improvements in employee productivity, morale, and retention.

In addition to increased productivity, other benefits to both the employer and the employee have been associated with offering telework programs. These benefits include reduced absenteeism, retention of high-level employees who might otherwise choose to leave public employment due to work schedule inflexibility, and reduced commuter costs (see Lister & Harnish, *infra*, note 2).

² K. Lister and T. Harnish, *The State of Telework in the U.S.: How Individuals, Business, and Government Benefit*, Telework Research Network (June 2011).

³ K. Lister and T. Harnish, *The Bottom Line on Telework: California Government Workforce*, Telework Research Network (September 2011).

⁴ Telework Research Network, "Pros and Cons" (October 22, 2008), www.teleworkresearchnetwork.com/pros-cons (as of Jan. 22, 2008).

Relevant telecommuting legislation

In recognition of the benefits of telecommute programs, legislation has been passed at the federal level and in the state of California encouraging telecommute programs for employees in positions where telecommuting is viable. The report *2012 Status of Telework in the Federal Government* (see Attachment F) gives a detailed account of how the Telework Enhancement Act of 2010 has transformed federal telework.⁵

In California, in 1990, Assembly Bill 2963 (Klehs; Stats. 1990, ch. 1389) added sections 14200 through 14203 to the Government Code, entitled “the State Employee Telecommuting Program,” authorizing state agencies to establish telecommuting programs as an element of transportation management programs. Four years later, Assembly Bill 2672 (Cortese; Stats. 1994, ch. 1209) amended section 14201 and added section 14200.1 to the Government Code “to encourage state agencies to adopt policies that encourage telecommuting by state employees.” (Gov. Code, § 14200.1(b).) Section 14200.1 sets forth legislative findings, declarations, and intent:

- (a) The Legislature finds and declares the following:
 - (1) Telecommuting can be an important means to reduce air pollution and traffic congestion and to reduce the high costs of highway commuting.
 - (2) Telecommuting stimulates employee productivity while giving workers more flexibility and control over their lives.
- (b) It is the intent of the Legislature to encourage state agencies to adopt policies that encourage telecommuting by state employees.

As amended, section 14201 deletes the earlier authorization and replaces it with a requirement that each state agency “shall review its work operations to determine where in its organization telecommuting can be of practical benefit to the agency [and] develop and implement a telecommuting plan as part of its telecommuting program in work areas where telecommuting is identified as being both practical and beneficial to the organization.”

Unintended negative consequences of telecommuting

According to the *2012 Status of Telework in the Federal Government* report (see Attachment F, page 52), telecommuting can also have unintended negative consequences. Those cited in the report include the following:

- Potential for social and career isolation
- Reduced performance as a result of employee isolation
- Missed opportunities for meeting colleagues to allow for unplanned or serendipitous knowledge exchange
- Reduce overall sharing in workplaces

⁵ U.S. Office of Personnel Management, *2012 Status of Telework in the Federal Government: Report to the Congress* (June 2012).

Implementation Requirements, Costs, and Operational Impacts

Option 1 implementation requirements. If option 1 is approved, the AOC will take the necessary steps to eliminate Policy 8.9 from the *AOC Personnel Policies and Procedures Manual* and will work with offices to inform current telecommuting staff and transition employees to perform their duties at an AOC worksite on a standard work schedule. No other implementation requirements are needed.

Option 2 implementation requirements. If option 2 is approved, the AOC will take the necessary steps to amend Policy 8.9 to eliminate regular telecommuting and only allow AOC employees to telecommute on an ad hoc basis, based on special circumstances. HR will communicate the amended policy to all AOC staff and initiate steps to transition current regular telecommuting staff to perform their duties at an AOC worksite on a standard work schedule. As previously indicated, HR has developed a process to track, monitor, and report on the use of ad hoc telecommuting within the AOC.

Option 3 implementation requirements. If option 3 is approved, the AOC will implement the proposed amended Policy 8.9 establishing strict controls and allowing for the approval, monitoring, and, if necessary, rescinding of telecommuting arrangements. HR will communicate the amended policy to all AOC staff and initiate steps to transition current regular telecommuting staff to be in compliance with the amended policy. HR has developed a process to track, monitor, and report on the use of regular and ad hoc telecommuting within the AOC. If this option is approved by the Judicial Council, a report on the status of telecommuting in the AOC will be provided in one year for review and further consideration.

Attachments

1. Attachment A-1: Present Policy 8.9, Working Remotely (Telecommuting)
2. Attachment A-2: Proposed Amended Policy 8.9, Working Remotely (Telecommuting)
3. Attachment B: Working Remotely Application Forms
4. Attachment C: Remote Work Log
5. Attachment D: 2011 *The State of Telework in the U.S.*
6. Attachment E: 2011 *The Bottom Line on Telework: California Government Workforce*
7. Attachment F: 2012 *Status of Telework in the Federal Government* report

Policy Number: 8.9

Title: Working Remotely (Telecommuting)

Contact: Human Resources Division, Policy Development Unit

Policy

Statement: The AOC's Remote Work Program provides employees the opportunity to work from home when doing so is consistent with business needs and the employee's job functions, as authorized by the employee's division director.

Contents:

- (A) Purpose of Remote Work Program**
- (B) Applicability**
- (C) Request and Approval Process**
- (D) Remote Work Schedules**
- (E) The Home Office**
 - (1) Work Environment**
 - (2) Office Equipment**
 - (3) Information Security**
 - (4) Health and Safety**
- (F) Other Employee Rights and Responsibilities**
- (G) Termination and Renewal of Remote Work Assignment**

(A) Purpose of Remote Work Program

The AOC recognizes the potential management and personal benefits available through a carefully planned and managed remote work program. When consistent with business needs and the employee's job functions, the AOC provides employees with a remote work option. Employees participate in the remote work program when, on a periodic basis, during their scheduled work hours, they perform their usual job duties from home. This policy does not intend to cover employees working remotely due to work-related travel.

(B) Applicability

Only AOC employees (regular or temporary, full-time or part-time, exempt or non-exempt) may apply to participate in the remote work program.

(C) Request and Approval Process

An employee may initiate a request to participate in the remote work program by submitting a completed Remote Worker Self-Assessment and Remote Work Application to his or her supervisor. The supervisor will review the request and make a recommendation to the division director to approve or decline the request. Approval of a remote work arrangement is at the discretion of the division director. In making this determination, the division director will consider work-related criteria, including:

- The employee's job functions and feasibility of performing work away from the office;

- Degree of supervision required;
- The performance and work habits of the employee;
- Business needs, including work demands of the employee's unit; and
- Suitability of proposed home work environment.

A request to participate in the remote work program may be approved only when the division director determines that, while working remotely, the employee can perform all the duties and responsibilities of the position in a productive, efficient, and satisfactory manner that is consistent with the needs of the organization. Employees with performance, attendance, or other work-related deficiencies, or whose jobs by their nature are not suitable for remote work, will not be approved for a remote work arrangement.

Requests to work remotely as a reasonable accommodation for a disability will be evaluated consistent with applicable law. Such requests should be directed to the employee's supervisor or the Human Resources Division, Integrated Disability Management Unit.

The Remote Worker's Agreement and Remote Work Checklist must be signed as indicated before remote working begins.

(D) Remote Work Schedules

Employees (including supervisors and managers) may be approved to work remotely as follows:

- During the first three months of employment, employees are not eligible to participate in the remote work program.
- After three months of employment, employees are eligible to request to work remotely up to a maximum of four days per month.
- After six successful months of participation in the remote work program, employees are eligible to request to work remotely up to a maximum of eight days per month.

Any exceptions to the above scheduling guidelines are at the discretion of the division director, in advance consultation with the Director of Human Resources. The remote work schedule applicable to a particular employee will be set by the supervisor before remote working begins. Remote workers must be available during the standard workday from 8 a.m. to 5 p.m., Monday through Friday (Hours of Work, policy 4.4(A)), or alternative schedule as approved by their supervisor, to the same extent as if working in the office. The remote work schedule may be modified, with supervisor approval, as needed:

- Remote workers may request approval for time off in the same manner as if not working remotely.
- With prior approval, remote workers may attend medical, dental, and business appointments on remote work days.

- For non-exempt employees, any overtime work must be authorized in advance and in writing (Hours of Work, policy 4.4(C)(1)).
- If an employee is needed in the office on a regularly scheduled remote work day, the employee must forgo the remote work day.

An employee may also be approved to work remotely on an "ad hoc" basis (i.e., not on a regular basis), which may arise due to special projects, the demand for expedited work products, or other business or personal needs.

(E) The Home Office

(1) Work Environment

Remote workers are responsible for maintaining a safe and productive work environment. Dependent care arrangements must be made so as not to interfere with work. Personal disruptions must be limited to the same extent as when working in the employee's primary work location.

(2) Office Equipment

The AOC will provide a laptop, subject to availability, for purposes of working remotely. Maintenance, repair, and replacement of AOC-owned equipment issued to remote workers is the responsibility of the AOC. The remote worker, however, must provide adequate care and protection of the equipment. (Use of AOC Property, policy 8.8(B)). In case of equipment malfunction, the remote worker must notify his or her supervisor immediately. Expenses for purchases, supplies, and repairs to personal equipment will not be reimbursed. Remote workers must restrict access to AOC-provided office equipment from family members and others.

The remote worker must also observe the following

- The remote worker is responsible to provide appropriate Internet connectivity in order to perform work duties. DSL or cable-based service is normally acceptable for this purpose.
- AOC-issued laptops must be brought into the office a minimum of once per month, and as requested, to assure the necessary technology and security updates are installed. The Information Services Division does not provide technology support for use of personal equipment for working remotely.
- Any software installed on AOC-issued laptops remains the property of the AOC and is subject to all applicable copyright laws and rules and regulations on the use or reproduction of software.
- Upon termination of a remote work assignment or employment, or when requested by the supervisor, the employee must return all AOC property, including software.

Computer support for remote workers is available from the Information Services Helpdesk during the hours of 7:30 a.m. – 6:00 p.m. Remote workers may

request assistance by submitting an on-line service request to the AOC Service Portal, or contacting the HelpDesk at (415) 865-4080 or helpdesk@jud.ca.gov.

(3) Information Security

Network and information security are important considerations when working remotely. Remote workers are expected to maintain the security, privacy, and confidentiality of information when working at the home work site or transporting data to and from work sites, including:

- Remote workers must follow all organizational data retention, backup and security procedures.
- Remote workers must restrict access to confidential and personal information from family members and others. (Use of AOC Property, policy 8.8(D)).
- Access-restricted material and data must remain secured, and cannot be taken out of the official work location without supervisory approval.

Some AOC applications will be restricted to on-site access for security reasons. Other data may be unavailable to remote workers for technical reasons. For example, remote access to network drives is only available to employees approved and provided resources for access.

Remote workers must report any potential breach of AOC information security immediately to the Information Services HelpDesk.

(4) Health and Safety

Remote workers are responsible for ensuring that their home offices comply with health and safety requirements. The AOC may decline an employee's request to work remotely or may terminate a remote work assignment based on safety considerations. The home office may be inspected by the AOC, by appointment, for compliance with health and safety requirements.

If an employee incurs a work-related injury while working remotely, workers' compensation law and rules apply. Consistent with AOC's Workers' Compensation Insurance, policy 6.6, employees must immediately notify their supervisor, or if their supervisor is not immediately available, the Human Resources Division, Integrated Disability Management Unit, of any work-related injury and complete all required documents.

(F) Other Employee Rights and Responsibilities

Remote workers maintain the rights and responsibilities set forth in AOC policies and procedures to the same extent as if not working remotely. In particular, employees must comply with Technology Use, policy 8.6, and AOC Computer Use Best Practices. In addition to AOC requirements on time reporting (Hours of Work, policy 4.4(D)), remote workers may be required to submit work logs of time spent and work performed while working remotely, at the discretion of their supervisor.

(G) Termination and Renewal of Remote Work Assignment

Participation in the remote work program is voluntary. Either the employee or the AOC may terminate participation in the remote work program at any time, for any reason. Failure to abide by the policies and procedures set forth in this policy may result in immediate termination of an employee's remote work assignment.

The Remote Work Application should be discussed and renewed annually, as well as when there is a change in the remote worker's or supervisor's position, or any other change that may impact the remote work arrangement. A remote work arrangement must not be continued when it is not in the best interests of the AOC or the employee.

Participation in the remote work program is approved based on specific criteria considered by the division director on a case-by-case basis. As circumstances may change over time, employees previously participating in the remote work program are not assured of a remote work assignment when returning from a leave of absence or after a job transfer.

Policy Number: 8.9 (Proposed)

Title: Working Remotely (Telecommuting)

**Contact: Judicial and Court Administrative Services Division,
Human Resources Services Office**

Policy

Statement: The AOC's Remote Work Program authorizes employees to work from home only when doing so is consistent with business needs and the employee's job functions, as authorized by the Administrative Director.

Contents:

- (A) Purpose of Remote Work Program**
- (B) Regularly Scheduled Remote Work**
 - (1) Applicability**
 - (2) Request and Approval Process**
 - (3) Remote Work Schedules**
 - (4) Remote Work Log**
- (C) Ad Hoc Remote Work**
- (D) The Home Office**
 - (1) Work Environment**
 - (2) Office Equipment**
 - (3) Information Security**
 - (4) Health and Safety**
- (E) Other Employee Rights and Responsibilities**
- (F) Termination and Renewal of Remote Work Assignment**

(A) Purpose of Remote Work Program

When consistent with business needs and the employee's job functions, the AOC provides employees with a remote work option. Employees participate in the remote work program when, on a periodic basis, during their scheduled work hours, they perform their usual job duties from home. The terms "working remotely", "work remotely", and "remote worker" as used in this policy refer to the performance of usual job duties at home. Home locations for purposes of this policy shall be in the state of California.

Suitability to participate in the remote work program is based, in part, on an employee's job classification and the nature of the work to be performed by the employee. Those factors alone may compel disapproval of an application to participate in the remote work program.

The AOC recognizes the potential organizational and personal benefits available through a carefully planned and managed remote work program. Both the state and federal government have recognized the positive impacts of remote work programs that include reductions in air pollution, traffic congestion and the costs of highway commuting. Additionally remote working can provide employees with more flexibility in their schedules resulting in increased productivity and employee morale.

This policy covers two types of remote work options:

(1) Regularly scheduled (which allows employees to work from home on a regular, ongoing basis, as described in Section (B) (3) of this policy), and

(2) "Ad hoc" (occasional, one-time approval to work from home, as described in Section (C) of this policy).

Employees working in more than one location, other than the home, due to work-related travel, and/or working from multiple AOC offices or court locations, are considered to be working in the office. This Remote Work Program Policy does not apply to that activity.

Requests to work from home as a reasonable accommodation for a disability will be evaluated consistent with applicable law. Such requests should be directed to the employee's supervisor and approved by the Human Resources Services Office (HR), Integrated Disability Management Unit.

(B) Regularly Scheduled Remote Work

(1) Applicability

Only non-supervisory AOC employees (regular or temporary, full-time or part-time, exempt or non-exempt) may apply to participate in the remote work program on a regularly scheduled basis.

(2) Request and Approval Process

An employee may initiate a request to participate in the remote work program on a regularly scheduled basis by submitting a completed Remote Worker Self-Assessment and Remote Work Application to his or her supervisor. The supervisor will review the request and make a recommendation to the office leadership. Office leadership will submit the request with a recommendation to Human Resources. Human Resources will review the request to ensure that the application meets all applicable policy criteria. HR will submit the request with a recommendation to the Executive Office for consideration. Approval of a remote work arrangement is at the discretion of the Administrative Director or designee.

Step 1 – Office Leadership Review

A request to participate in the remote work program must be reviewed by the employee's office leadership, who will determine if the employee, while working from home, can perform all of the duties and responsibilities of the position in a manner that meets the needs of the organization. When considering a request to work from home, all of the following factors will be considered:

- Nature of Work
The type of work performed by the employee.
- Quantity of work
How much work can get done from home?

- Quality of work
How well can the work be completed from home?
- Timeliness
Can timelines be met when working from home?
- Ability to handle multiple priorities
Is it possible to successfully multitask when working from home?

Employees must also demonstrate suitability of the proposed home work environment.

Employees with performance, attendance, or other work-related deficiencies, or whose jobs by their nature are not suitable for remote work, will not be approved for a remote work arrangement.

Step 2 – Human Resources Services Office Review

Completed remote work applications reviewed by the originating office's leadership shall be submitted to HR for additional review.

HR will review applications to ensure that signatures have been obtained; the agreement is consistent with the parameters of AOC policies and procedures; and the employee's duties and responsibilities align to the five factors noted previously.

Any remote work agreement that is not complete, does not have all required signatures, or is outside of the scope of policies will be returned to the originating office for review. Remote work schedules may not begin until the remote work agreement has been approved by the Administrative Director or designee.

Step 3 – Administrative Director or designee's review

The Administrative Director or designee will review the remote work agreement and determine whether to approve or deny. If the remote work agreement is approved, HR will notify the Office Leadership of the approval and a start date can be coordinated with the employee.

(3) Remote Work Schedules

Employees (excluding supervisors, managers, assistant directors, and directors) may be approved to work from home on a regularly scheduled basis as follows:

- During the first 12 months of employment, employees are not eligible to participate in the remote work program.
- After 12 months of employment, employees are eligible to request to work from home up to a maximum of one day per week in any given week.

If approved, the remote work schedule applicable to a particular employee will be set by the supervisor before remote working begins. Remote workers must be available during the standard workday from 8 a.m. to 5 p.m., Monday through Friday (Hours of Work, policy 4.4(A)), or alternative schedule as approved by their supervisor, to

the same extent as if working in the office. The remote work schedule may be modified, with supervisor approval, as needed:

- The remote work assignment may be suspended or terminated at any time, for any reason at the discretion of the office leadership. If a remote work assignment is suspended or terminated the HR work coordinator must be notified immediately.
- If an employee is needed in the office on a regularly scheduled remote work day, the employee must forgo the remote work day. Employees cannot “make up” missed remote work days.
- Remote workers must request approval for time off in the same manner as if not working from home.
- With prior approval, remote workers may attend medical, dental, and business appointments on remote work days.
- For non-exempt employees, any overtime work must be authorized in advance and in writing (Hours of Work, policy 4.4(C)(1)).

(4) Remote Work Log

AOC employees approved for a regular remote work schedule must complete a remote work log for each day that they work from home. The remote work log must be provided regularly to the supervisor for review of work progress during remote work days. Employees who do not satisfactorily complete a remote work log or their assignments during remote work days may have their remote work assignment suspended or terminated at the discretion of the office leadership.

(C) Ad Hoc Remote Work

An employee of the AOC (including managers and supervisors) may alternatively be approved to work from home on an “ad hoc” basis (i.e., not on a regular basis), which may arise due to special projects, the demand for expedited work products, or other business or personal needs. The employee’s office leader may approve ad hoc work from home on a case-by-case basis. Each office will submit a monthly report of ad hoc remote work to the HR remote work coordinator. Quarterly reports will be submitted to the Administrative Director. Approval to work remotely on an ad hoc basis does not require submission of the forms referenced in Section (B)(2) of this policy and does not confer eligibility to work from home on a regularly scheduled basis.

“Ad hoc” remote work occurrences are limited to two days per month in any given month. Employees who are participating in the regularly scheduled remote work program may not, at the same time, work from home on an “ad hoc” basis.

The supervisor or manager recommends approval of the ad hoc remote working request and submits to his or her office leadership. Office leadership may approve the ad hoc remote work and record the usage on a monthly report that will be submitted to HR. HR will collect that data and provide quarterly utilization reports to the Administrative Director.

(D) The Home Office

(1) Work Environment

Remote workers are responsible for maintaining a safe and productive work environment. Dependent care arrangements must be made so as not to interfere with work. Personal disruptions must be limited to the same extent as when working in the employee's primary work location.

(2) Office Equipment

The AOC will provide a laptop, subject to availability, for purposes of working from home. Maintenance, repair, and replacement of AOC-owned equipment issued to remote workers is the responsibility of the AOC. The remote worker, however, must provide adequate care and protection of the equipment. (Use of AOC Property, policy 8.8(B)). In case of equipment malfunction, the remote worker must notify his or her supervisor immediately. Expenses for purchases, supplies, and repairs to personal equipment will not be reimbursed. Remote workers must restrict access to AOC-provided office equipment from family members and others.

The remote worker must also observe the following

- The remote worker is responsible to provide appropriate Internet connectivity in order to perform work duties. DSL or cable-based service is normally acceptable for this purpose.
- AOC-issued laptops must be brought into the office a minimum of once per month, and as requested, to assure the necessary technology and security updates are installed. The Information Technology Services Office does not provide technology support for use of personal equipment for working from home.
- Any software installed on AOC-issued laptops remains the property of the AOC and is subject to all applicable copyright laws and rules and regulations on the use or reproduction of software.
- Upon termination of a remote work assignment or employment, or when requested by the supervisor, the employee must return all AOC property, including software.

Computer support for remote workers is available from the Information Technology Services Office Helpdesk during the hours of 7:30 a.m. – 6:00 p.m. Remote workers may request assistance by submitting an on-line service request to the AOC Service Portal, or contacting the HelpDesk at (415) 865-4080 or helpdesk@jud.ca.gov.

(3) Information Security

Network and information security are important considerations when working from home. Remote workers are expected to maintain the security, privacy, and confidentiality of information when working at the home work site or transporting data to and from work sites, including:

- Remote workers must follow all organizational data retention, backup and security procedures.
- Remote workers must restrict access to confidential and personal information from family members and others. (Use of AOC Property, policy 8.8(D)).
- Access-restricted material and data must remain secured, and cannot be taken out of the official work location without supervisory approval.

Some AOC applications will be restricted to on-site access for security reasons. Other data may be unavailable to remote workers for technical reasons. For example, remote access to network drives is only available to employees approved and provided resources for access.

Remote workers must report any potential breach of AOC information security immediately to the Information Technology Services Office HelpDesk.

(4) Health and Safety

Remote workers are responsible for ensuring that their home offices comply with health and safety requirements. The AOC may decline an employee's request to work from home or may terminate a remote work assignment based on safety considerations. The home office may be inspected by the AOC, by appointment, for compliance with health and safety requirements.

If an employee incurs a work-related injury while working from home, workers' compensation law and rules apply. Consistent with AOC's Workers' Compensation Insurance, policy 6.6, employees must immediately notify their supervisor, or if their supervisor is not immediately available, the Human Resources Services Office, Integrated Disability Management Unit, of any work-related injury and complete all required documents.

(E) Other Employee Rights and Responsibilities

Remote workers maintain the rights and responsibilities set forth in AOC policies and procedures to the same extent as if not working remotely. In particular, employees must comply with Technology Use, policy 8.6 and AOC Computer Use Best Practices.

(F) Termination and Renewal of Remote Work Assignment

Participation in the remote work program is voluntary and it is a privilege. Either the employee or the AOC may terminate participation in the remote work program at any time, for any reason or no reason at all. Failure to abide by the policies and procedures set forth in this policy may result in immediate termination of an employee's remote work assignment. Any suspension or termination of a remote work assignment must be immediately reported to HR.

It shall be the continuing duty of the office leadership in each office, in which one or more employees telecommute, to assess the performance of each such employee by adhering to the terms, conditions, and standards of this policy.

Approval to participate in the remote work program is only valid for the fiscal year in which it is approved. Remote Work Applications must be renewed and approved by the Administrative Director or designee each fiscal year, on or before June 30, as well as when there is a change in the remote worker's or supervisor's position, or any other change that may impact the remote work arrangement. Remote workers who wish to continue their current remote work arrangement without modification are only required to complete the Remote Work Application form (Attachment II) to request renewal. A remote work arrangement must not be continued when it does not meet the business needs or help accomplish the mission of the AOC.

All regularly scheduled remote work arrangements must be approved by the Administrative Director or designee. Approval to participate in the remote work program is based on specific criteria considered by the employee's office leadership and the Human Resources Services Office, on a case-by-case basis. As circumstances may change over time, employees previously participating in the remote work program are not assured of a remote work assignment when returning from a leave of absence or after a job transfer.

Administrative Office of the Courts Remote Worker Self-Assessment

A successful remote worker has particular traits, a job suitable for working remotely, and a remote work office or location that's conducive to work. Read each of the numbered sections below, and check the box that most accurately describes you or your situation. Your self-assessment will help you decide whether a remote work arrangement is right for you. See the bottom of page 3 for help in evaluating your self-assessment.

- 1. Please answer the questions below honestly and candidly by selecting “always,” “usually,” “sometimes,” or “not really.”**

	Please choose the most accurate option for each description below.	Always	Usually	Sometimes	Not Really
A	Are you self-motivated, self-disciplined, and able to work independently?				
B	Can you complete projects on time with minimal supervision and feedback?				
C	Are you productive when no one is checking on you or watching you work?				
D	Do you have strong organizational and time-management skills and are you results-oriented?				
E	Will you remain focused on your work while at home, and not be distracted by television, housework, or visitors?				
F	Do you manage your time and workload well, solve many of your own problems, and find satisfaction in completing tasks on your own?				
G	Are you comfortable setting priorities and deadlines and do you keep your sights on results?				

- 2. Please answer the questions below honestly and candidly by selecting “yes” or “no.”**

	Please answer yes or no to the following questions.	Yes	No
A	Are you comfortable working alone and disciplined enough to leave work at quitting time?		
B	Can you adjust to the relative isolation of working at home?		
C	Do you have the self-control to work neither too much nor too little?		
D	Can you set a comfortable and productive pace while working at home?		
E	Are you knowledgeable about policies and procedures of the AOC and your division?		
F	Have you been on the job long enough to know how to do your job in accordance with policies and procedures of the AOC and your division?		

**Administrative Office of the Courts
Remote Worker Self-Assessment**

Question 2. Continued...

	Please answer yes or no to the following questions.	Yes	No
G	Do you have well-established work, communication, and social patterns at your assigned office?		
H	Have you and your supervisor discussed whether coworkers would have additional work when you work at home and, if so, how the work would be handled?		
I	Have you determined how to provide support to coworkers while working at home?		
J	Do you have an effective working relationship with coworkers?		
K	Have you evaluated the effects of your remote work days and those of your coworkers in maintaining adequate in-office communication?		
L	Are you adaptable to changing routines and environments?		
M	Have you demonstrated an ability to be flexible about work routines and environments?		
N	Are you willing to come into your assigned office on a regularly scheduled remote work day if your supervisor, coworkers, or customers need you there?		
O	Are you an effective communicator and team player?		
P	Do you communicate well with your supervisor and coworkers and are you able to express needs objectively and develop solutions?		
Q	Have you developed ways to communicate regularly with your supervisor and coworkers that you can use when you work remotely?		
R	Current job performance is a strong indicator of your potential success as a remote worker. Consider how any problems or developmental needs evident in your last performance evaluation might affect your remote work experience. Are you successful in your current position; do you know your job well; and do you have a track record of performance?		

3. Do you have the right job for a remote work arrangement? Check all of the examples below that apply to your position.

Job responsibilities that can be arranged so that there is no difference in the level of service provided to the customer

Minimal requirements for direct supervision or contact with the customer

Low face-to face communication requirements with the ability to arrange days when communication can be handled by telephone or e-mail

Minimal requirements for special equipment

Ability to define tasks and work products with measurable work activities and objectives

Ability to control and schedule work flow

Administrative Office of the Courts Remote Worker Self-Assessment

- 4. Do you have the right tasks for a remote work arrangement? Check all of the examples below that apply to your position. Please add any additional tasks that are appropriate to your position.**

Analysis	Auditing reports
Budgeting	Calculating
Contacting customer	Data entry
Design and Graphics work	Dictating
Document review	Editing
Evaluations	Field visits
Planning	Preparing contracts
Project management/planning	Reading
Recordkeeping	Research
Telephoning	_____
Word Processing	_____
Writing	_____

- 5. Do you have an appropriate home work environment? Check all of the examples below that apply to your work environment.**

A safe, comfortable work space where it is easy to concentrate on work
 The level of security required by the agency
 The necessary office equipment and software that meet agency standards
 A telephone, with a separate home office line if required, or a cell phone or pager
 Household members who will understand you're working and won't disturb you

Are you the right kind of worker?

If your answers provided in Question 1 and 2 are "Always" or "Yes," you're the kind of employee likely to be successful at working remotely.

Do you have the right kind of job?

You should be able to check every item under Question 3. You should be able to check enough boxes under Question 4 so that you can successfully work remotely.

Do you have the right home environment?

You should be able to check every item under Question 5.

Administrative Office of the Courts Remote Work Application

Instructions: Employee completes application and gives to the supervisor, who conducts a preliminary review, and then discusses application with the Office Leadership, who reviews request and recommends approval or denial. If the Office Leader approves the request the application is reviewed by Human Resources where a recommendation is made to approve or deny based on policy. The request is then submitted to the Administrative Director or designee for final approval or denial.

If approved, Human Resources will return the approved request to the Office Leadership with a recommended start date.

The supervisor then meets with employee to discuss the outcome of the request. Remote Work agreements are valid for one fiscal year and must be renewed every July regardless of the official start date.

Employee information:

Name: _____ Office phone: _____

Office: _____ Supervisor: _____

Proposed remote work location must be in the State of California:

Home Address: _____ City: _____

Remote work location phone: _____ Fax: _____

Pager: _____ Cell: _____

Remote work location e-mail: _____

Remote work statistics:

How long have you worked for the AOC? : _____years _____months

Hours of travel time saved per week: _____

Day of the Week Requested as a remote work day: (Circle One)

Mon Tues Wed Thurs Fri

Typical types of tasks or assignments to be completed on remote work days (Please see list of tasks in question number 4 of the Remote Work Self Assessment Form):

Dependent care:

Do you have dependents requiring care during remote work hours?

Yes No

If yes, would you have dependent care to relieve you from primary-care responsibilities during remote work hours?

Yes No



Supervisor Recommendation Recommend Approval Recommend Denial

Reason (If denial is recommended): _____

Supervisor: _____

Office Leader Recommendation Recommend Approval Recommend Denial

Reason (If denial is recommended): _____

Office Leader: _____

HR Recommendation Recommend Approval Recommend Denial

Reason (If denial is recommended): _____

HR Representative: _____

Administrative Director or designee decision:

Approved Denied

Signature: _____



To be completed by Human Resources Services Office:

Recommended Start Date: _____

**Administrative Office of the Courts
Remote Worker's Agreement**

The AOC will pay for the following expenses:

- Charges for business-related telephone calls and faxes
- Maintenance and repairs to AOC-owned equipment

Claims will be submitted on a Travel Expense Claim along with receipt, bill, or other verification of payment of the expense.

The AOC will not pay for the following expenses:

- Maintenance or repairs to personal equipment
- Internet connection
- Utility costs (e.g., electricity, gas) associated with the use of the computer or occupation of the home, or for the cost of adding an additional telephone line
- Equipment and supplies (these should be requisitioned through the office)
- Travel from the remote work location to your assigned office
- Travel while working remotely (unless the travel is for an approved business purpose)

I agree that the AOC is not liable for damages to my property while working remotely. The AOC is also not liable for any injuries or claims by others at the remote work location.

I agree to carry out the steps needed for good safety and security in the home-office setting. I agree to check with my supervisor when matters of security or confidentiality are at issue.

I have read and understand the AOC's policy on Working Remotely and agree to comply with that policy and its procedures.

Remote Worker: _____ Date: _____

Offices: Please submit the signed Remote Worker's Agreement to the Human Resources Services Office, Labor & Employee Relations Unit, and retain a copy for the supervisor's file.

**Administrative Office of the Courts
Remote Work Checklist**

Name of Remote Worker: _____

Name of Supervisor/Manager: _____

1. Employee has read the orientation documents and the Working Remotely policy.
2. Employee has an approved remote work schedule.
3. Equipment issued by the AOC is documented.
4. Performance expectations have been discussed and are clearly understood.
5. Assignments and due dates are documented.
6. Requirements for adequate and safe office space at home and the *Safety Checklist for Remote Workers* have been reviewed with the employee and the employee certifies that those requirements have been met.
7. Requirements for care of equipment assigned to the employee have been discussed and are clearly understood.
8. Employee is aware of the responsibility to ensure the security and confidentiality of information used in the course of working remotely.
9. In addition to the employee's supervisor and other management personnel, the following personnel is authorized to have the employee's remote work location phone number:

10. Employee has read and signed the Remote Worker's Agreement.

Remote Worker: _____

Date: _____

Supervisor/Manager: _____

Date: _____

Offices: Please submit the signed Remote Work Checklist to the Human Resources Services Office, Labor & Employee Relations Unit, and retain a copy for the supervisor's file.

**Administrative Office of the Courts
Safety Checklist for Remote Workers**

The following checklist is recommended for use by each remote worker in organizing an alternate work site. The remote worker must review this checklist with his or her supervisor before working remotely. The remote worker and supervisor are encouraged to work together to ensure the safety of the alternate work site.

Work Site

- Remote worker has a clearly defined work space that is kept clean and orderly.
- The work area is adequately illuminated with lighting directed toward the side or behind the line of vision, not in front or above it.
- Exits are free of obstructions.
- Supplies and equipment (both AOC and employee-owned) are in good condition.
- The area is well ventilated and heated.
- Storage is organized to minimize risks of fire and spontaneous combustion.
- All extension cords have grounding conductors.
- Exposed or frayed wiring and cords are repaired or replaced immediately upon detection.
- Electrical enclosures (switches, outlets, receptacles, junction boxes) have tight-fitting covers or plates.
- Surge protectors are used for computers, fax machines, and printers.
- Heavy items are securely placed on sturdy stands close to walls.
- Computer components are kept out of direct sunlight and away from heaters.

Emergency Preparedness

- Emergency phone numbers (hospital, fire department, police department) are posted at the alternate work site.
- A first aid kit is easily accessible and replenished as needed.
- Portable fire extinguishers are easily accessible and serviced as needed.
- An earthquake preparedness kit is easily accessible and maintained in readiness.

**Administrative Office of the Courts
Safety Checklist for Remote Workers**

Ergonomics

___ Desk, chair, computer, and other equipment are of appropriate design and arranged to eliminate strain on all parts of the body.

___ *Easy Ergonomics for Desktop Computer Users*, published by the California Department of Industrial Relations, is available for easy reference at the alternate work site.

Telecommuting Log Sheet

Name: _____

Date	Work Scheduled	Work Completed	Time	Signature Verification

Telecommuting Log Sheet

Name: _____

Date	Work Scheduled	Work Completed	Time	Signature Verification

Telecommuting Log Sheet

Name: _____

Date	Work Scheduled	Work Completed	Time	Signature Verification

Telecommuting Log Sheet

Name: _____

Instructions

Please complete a telecommuting log each week, sign it, and submit a copy to your manager. On the log please indicate the work you have scheduled to be done while telecommuting, the actual work you were able to complete, and the time it took you to complete that work.

For example, for October 18th you may have scheduled:

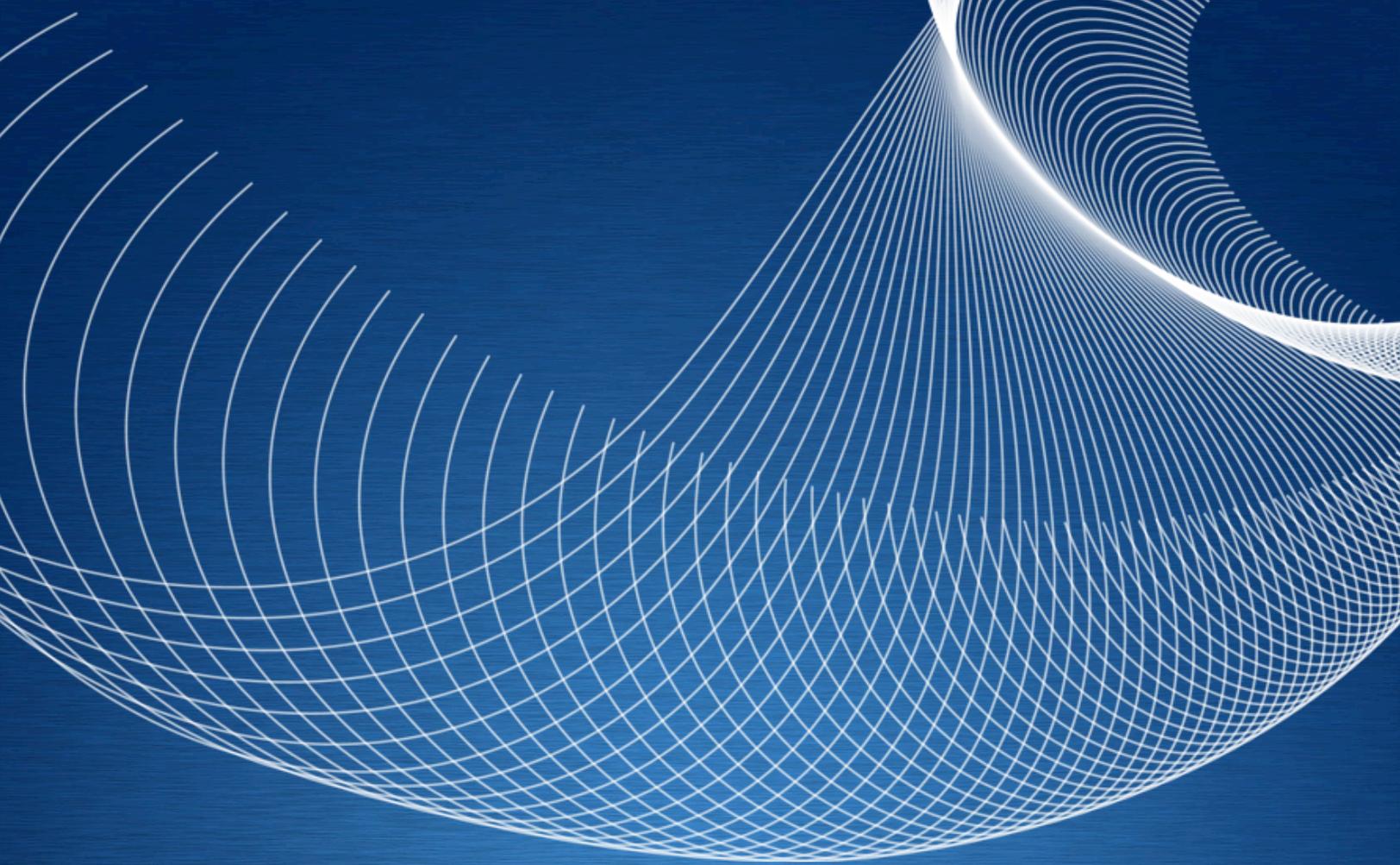
- Creating a 20 minute powerpoint presentation (from scratch),
- Writing 15 confirmation letters, and
- Drafting a proposed civil law institute program.

However, you were only able to:

- Complete the powerpoint presentation, and
- Draft the proposed civil law institute program

within a normal working day of eight hours.

The confirmation letters are not done and could be completed during your next telecommuting day.



The State of Telework in the U.S.

How Individuals, Business, and Government Benefit

June 2011
Kate Lister & Tom Harnish



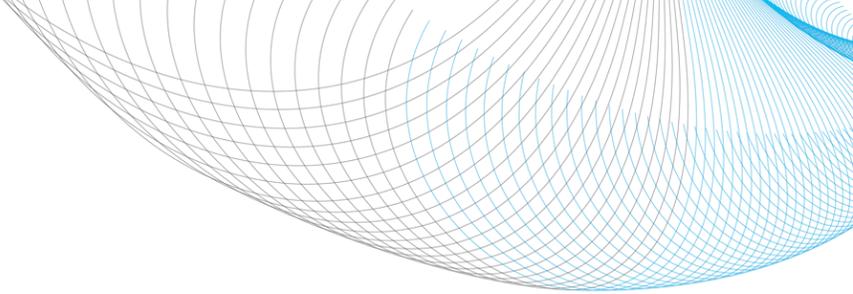
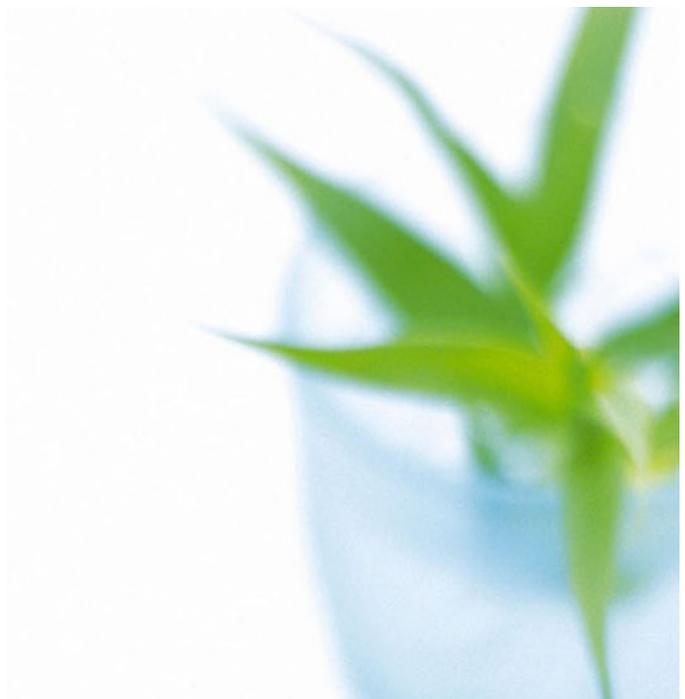


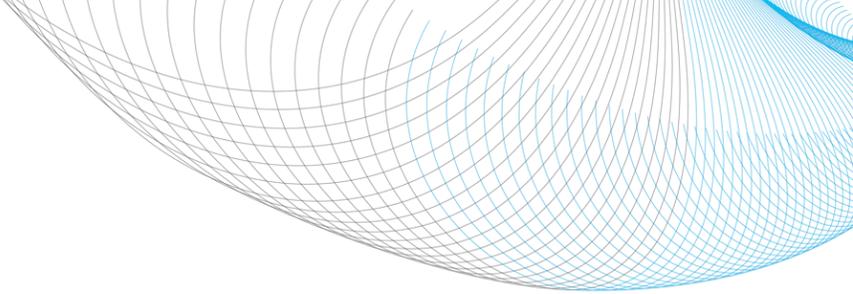
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INTRODUCTION

The purpose of this paper is to shed light on when and where work is done in the U.S., how that’s changed in recent years, and where the trend might be headed.

But there’s a problem. *“The task of trying to make sense of the various government sources of work at home data is a statistical Vietnam,”* said Bruce Phillips while he was senior fellow at the National Federation of Independent Business Research Foundation. *“The data goes in, but you can’t get it out.”*

Part of the problem is a matter of terminology. So to make sure there’s no confusion, the focus of this report is on those who work at home (or in some cases elsewhere) and are not self-employed—neither as a sole proprietor or in an incorporated business)—in other words, employees who telecommute, or ‘workshift’ as some say. To avoid constant repetition throughout this paper, unless otherwise noted, the words ‘work-at-home’ (WAH) and the term ‘workshift’ refer to employees who fit the above conditions.



No one would disagree that the U.S. workforce is increasingly mobile. But, beyond that broad statement, we know little about the rate of increase in mobility—how often people are out of the office, where they are, and what they’re doing. For that matter, there’s no agreed-upon method of defining who *they* are.

Do you include an employee who takes work home on weekends as someone who works from home? What about a plumber who has an office at home, but earns his living only when he’s on the road? Does it matter whether a person who works at home is employed by a private company, employed by the government, or is self-employed? What about an unpaid family worker, do we include him or her? How do you categorize a mobile worker who works at client locations, in their car, or at a coffee shop? Does someone who works remotely one day a week belong in the same statistical bucket as someone who works at home all the time?

If we could answer these questions and collect consistent data about how and where people work, it would help business leaders:

- ▶ Better understand their facilities’ needs, increase workspace efficiency, and reduce real estate overhead
- ▶ Evaluate their IT readiness and the communications, collaboration, and technology needs of their workforce
- ▶ Effectively integrate employee mobility into hiring, training, and management paradigms
- ▶ Develop and market products and services that support remote work
- ▶ Better address the special needs of the disabled, of military families, and of caregivers

For city, state, and federal leaders, a better understanding of workforce mobility could help them:

- ▶ Evaluate the extent to which home-based work can reduce traffic congestion and greenhouse gases in their communities
- ▶ Solve regional issues such as outbound workforce migrations, talent shortages, and labor force mismatches

- ▶ Understand the ROI of broadband investments
- ▶ Reduce the offshoring of jobs
- ▶ Encourage populations to work and shop where they live
- ▶ Help establish laws to encourage home-based work and abolish those that discourage it
- ▶ Help understand the role that work-at-home programs could play in transportation demand management, energy conservation, and greenhouse gas emissions
- ▶ Reduce un- and under-employment
- ▶ Increase productivity
- ▶ Save money

Until now, some of the most informative data about when and where people work have been buried in nearly impenetrable jungle of databases. We've hacked our way through them, and made some surprising discoveries.

We hope you'll find *The State of Telework in the U.S.* both interesting and informative. What's more, we hope it will leave at least some of you wanting more because there is still much we don't know about the growing population of anytime, anywhere workers.



KEY FINDINGS

Unless otherwise noted, all telecommuter statistics refer to non-self-employed people who principally work from home.

- ▶ Forty-five percent of the US workforce holds a job that is compatible with at least part-time telework.
- ▶ Fifty million U.S. employees who want to work from home hold jobs that are telework compatible though only 2.9 million consider home their primary place of work (2.3% of the workforce).
- ▶ The existing 2.9 million US telecommuters save 390 million gallons of gas and prevent the release of 3.6 million tons of greenhouse gases yearly.
- ▶ If those with compatible jobs worked at home 2.4 days a week (the national average of those who do), the reduction in greenhouse gases (51 million tons) would be equivalent of taking the entire New York workforce off the roads.
- ▶ The national savings would total over \$900 billion a year; enough to reduce our Persian Gulf oil imports by 46%.
- ▶ The energy saved annually from telecommuting could exceed the output of all renewable energy sources combined.
- ▶ Regular telecommuting grew by 61% between 2005 and 2009. During the same period, home-based self-employment grew by 1.7%.
- ▶ Based on current trends, with no growth acceleration, regular telecommuters will total 4.9 million by 2016, a 69% increase from the current level but well below other forecasts.
- ▶ Seventy-six percent of telecommuters work for private sector companies, down from 81% in 2005—the difference is largely attributable to increased WAH among state and federal workers.
- ▶ Using home as a 'reasonable accommodation' per the Americans with Disabilities Act, 316,000 people regularly work from home.
- ▶ The typical telecommuter is a 49-year-old, college-educated, salaried, non-union employee in a management or professional role, earning \$58,000 a year at a company with more than 100 employees.

- ▶ Relative to the total population, a disproportionate share of management, professional, sales and office workers telecommute.
- ▶ Non-exempt employees are far less likely to work at home on a regular or ad hoc basis than salaried employees.
- ▶ Over 75% of employees who work from home earn over \$65,000 per year, putting them in the upper 80 percentile relative to all employees.
- ▶ Larger companies are more likely to allow telecommuting than smaller ones.
- ▶ Non-union organizations are more likely to offer telecommuting than those with unions.
- ▶ In a quarter of the nation's 20 largest metro areas, more people now telecommute than use public transportation as their "principal means of transportation to work."
- ▶ There is no positive correlation between cities with the worst congestion or longest round-trip commutes and the extent of telework. For example, among the largest 15 metro areas, New York had the third lowest percent of regular telecommuters (2.1%).
- ▶ Among the 15 largest U.S. metro areas, San Diego-Carlsbad-San Marcos (CA) has the highest concentration of people who consider home their primary place of work (4.2%) and Detroit-Warren-Livonia (MI) has the lowest (1.8%).
- ▶ The region with the fastest percentage growth in regular employee telecommuting was Riverside-San Bernardino-Ontario (CA)—posting a 77% increase since 2005 (based on growth relative to the local total population and among populations with over 1 million workers).
- ▶ Among the 124 metropolitan areas evaluated, 34% showed greater five-year growth in regular telecommuters than the national growth.
- ▶ The jury is still out on what impact the recession had on telecommuting. It appears that occasional telework decreased, and regular telework (at least weekly) increased, but we won't know until the 2010 Census data is available. Whatever the conclusion, the five year telework growth rate has been significant
- ▶ The biggest barrier to telecommuting, by a wide margin, is management fear and mistrust.

METHODOLOGY

Various federal agencies collect information about where people. The Census Bureau collects data on how people travel to work, with one option not traveling at all. The Bureau of Labor Statistics (BLS) captures information on where and when people work. BLS also polls companies about whether they offer flexible workplace options. The IRS and the SBA gather information about home-based businesses. And the Office of Personnel Management (OPM) tracks telework practices in the federal workforce.

In the private sector, a number of organizations track various forms of mobile work, including WorldatWork.

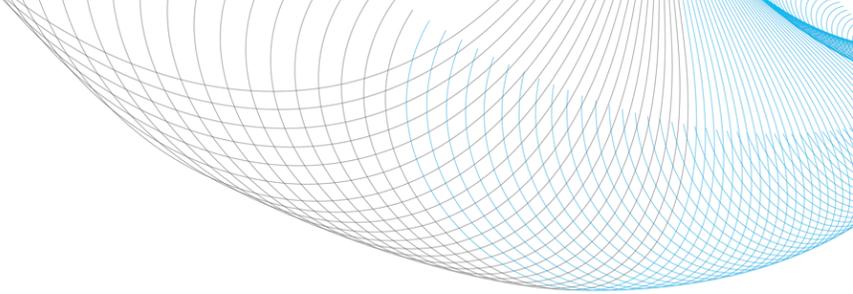
With all that tracking and gathering, you'd think it would be easy to create a picture of where and when people work. Unfortunately, it's not. The following is a summary of the various sources of data used in compiling this paper, along with an explanation of the limitations of each.

PUBLIC SECTOR DATA

Census / American Community Survey (ACS)

ACS is a nationwide survey conducted annually by the U.S. Census Bureau. It produces one-year estimates for geographic areas with a population of 65,000 or more: the nation, all states, the District of Columbia, all congressional districts, approximately 800 counties, and 500 metropoli-





tan and micropolitan statistical areas. About three million housing unit addresses and 307 million people are represented in the weighted sample.

ACS asks survey respondents: “What was your primary means of transportation to work during the survey week?”

- ▶ Car, truck, or van - driving alone
- ▶ Car, truck, or van - carpooled
- ▶ Public transportation
- ▶ Walked
- ▶ Taxi, motorcycle, or bike
- ▶ Worked at home

ACS — Limitations

While the question offers some insight into the WAH workforce, it falls short of providing useful answers in a number of ways:

1) While the respondent is also asked whether they work for a private or public sector organization, if they’re self-employed, or if they’re an unpaid family worker, that ‘class of worker’ data is only tied to the ‘means of transportation to work’ category in a handful of Census Bureau reports.



For example, American Fact Finder, the primary search tool for Census data, does not allow users to determine the number of non-self-employed people in the construction industry who work from home in Millville, New Jersey. It could be used to determine in general how many were self-employed, were unpaid family workers, or were state government workers. It could also determine how many people in Millville just worked from home, but it would not allow you to break out the self-employed.

2) ACS only captures information about people who primarily work at home, not those who do so on an occasional basis—a group far larger than those who do so most of the time.

3) ACS does not capture information about people who work remotely from client offices, shared office centers, coffee shops, their cars, or other ‘third places’.

The Census Bureau occasionally conducts research that addresses some of these limitations, but they have not done so since 2004.

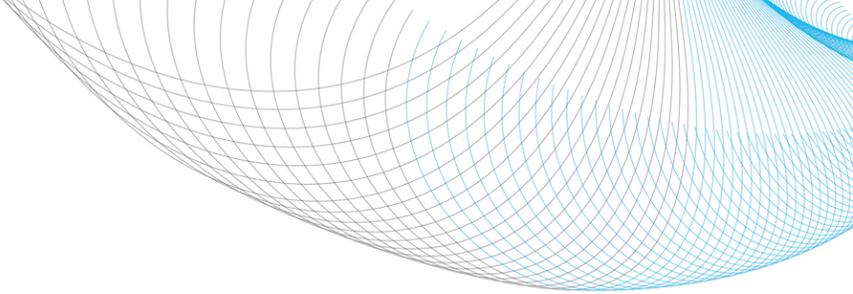
Use of ACS Data in This Paper

Because of the limitation of available ACS standard tables and online query interface, most of the data in this report was compiled from our own special tabulations of the Census Public Use Microdata Samples (PUMS)—a statistically accurate representation of the population based on a 5% micro-sample.

Five-year trend data is based on PUMS one-year estimates from 2005 through 2009, the most recent year available.

Certain metropolitan areas that were redefined during the five-year period are excluded from the trend analysis. Among those with workforces larger than one million people; the Denver and Miami metropolitan areas were omitted for this reason.

The statistical validity of changes in the WAH population obviously diminishes with a decrease in population size. In



general, the data regarding the total regional WAH population is statistically valid, but the data for areas within populations smaller than a million may not be. For this reason, we primarily focus on larger metro regions.

Bureau of Labor Statistics (BLS)

Two Bureau of Labor Statistics (BLS) surveys—the American Time Use Survey (ATUS), and the National Compensation Survey (NCS)—offered some useful material for this paper. However, the annual BLS survey does not allow standard searches or produce reports that distinguish the self-employed from the non-self employed at the industry, occupation, or other granular levels. The most recent surveys that do separate the self-employed from the rest of the WAH population cover only 2003 through 2007.

Further, BLS respondents are asked to answer questions based on where they worked *on a particular survey day*, which may or may not be indicative of their regular workplace.

BLS American Time Use Survey (ATUS)

ATUS is conducted annually. It includes, among other things, information about where and when people work—at their workplace, at home, or at another location. The data is collected through telephone interviews.

ATUS — Limitations

ATUS defines the term 'working' as time employed people spend doing tasks required for a job. A person who reads work-related e-mail messages for 10 minutes on a Saturday is counted as working on that day, as is someone who worked a 12-hour shift.

ATUS does not distinguish between people who are paid to work from home and those who simply take work home.

BLS National Compensation Survey (NCS)

The National Compensation Survey is conducted annually. It collects information from companies about the compensation and benefits they offer.

One benefit choice is 'flexible workplace'. BLS defines this as: "Permits workers to work an agreed-upon portion of their work schedule at home or at some other approved location, such as a regional work center." They note, "...such arrangements are especially compatible with work requiring the use of computers linking the home or work center to the central office."

NCS — Limitations

NCS data only indicates who offers a benefit, not who uses it, how, or how often.

Their count does not include companies that offer workplace flexibility on an ad hoc or occasional basis.

Other Federal Data

Data about participation in telework programs within the federal workforce comes from the annual *Status of Telework in the Federal Government—Report to Congress*.

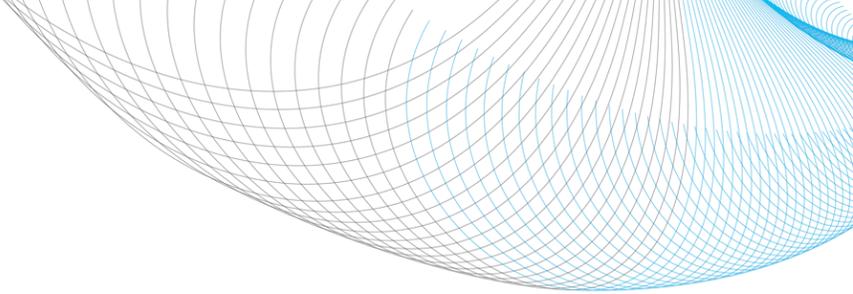
PRIVATE SECTOR DATA

WorldatWork

WorldatWork is a non-profit organization with 30,000+ members in 75 countries. Nearly all Fortune 1000 companies are WorldatWork members. Results from two of their reports are included in this paper: *Telework 2011—A WorldatWork Special Report* and the *2011 Survey on Workplace Flexibility*.

Telework 2011—A WorldatWork Special Report

Together with The Dieringer Research Group, WorldatWork has conducted periodic surveys about ad hoc, oc-



casional, and regular telework among its members since 2003.

Their *Telework 2011—A WorldatWork Special Report* (based on 2010 data) was released on June 23, 2010.¹

Approximately 1,000 randomly selected U.S. adults were surveyed for the 2011 report. The data was weighted to match the current population.

Telework 2011 – Limitations

Because respondents self-reported their business type, some self-employed respondents may be counted among employee telecommuters. This may be significant because according to ACS data, the self-employed population suffered significant declines during the recession, while the employee telecommuter population grew.

Due to the small sample size, the teleworker segment of their sample has a margin of error of ±10 percent.

Survey on Workplace Flexibility

The *WorldatWork 2011 Survey on Workplace Flexibility*² asked its 5,191 global members what types of flexible work arrangements they offered to some or all employees. Of this group, 537 responses were included in the results.

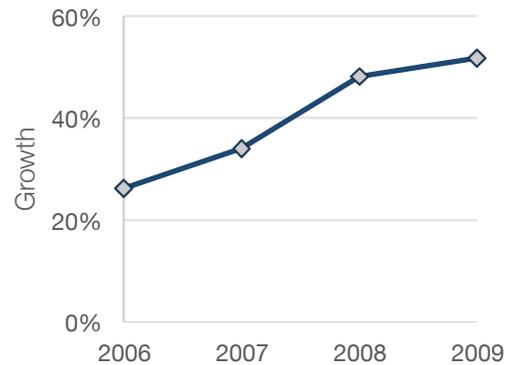
Survey on Workplace Flexibility – Limitations

Because WorldatWork’s membership is comprised of a disproportionate share of large employers, (91 percent have more than 100 employees), their data under-represents small employers.

WAH TRENDS

ACS data showed that while the growth rate varied from year to year, the employee WAH population grew 61% between 2005 to 2009 (see Chart 1).

Chart 1 - Cumulative Increase In WAH
Source: 2006 to 2009 ACS PUMS Data

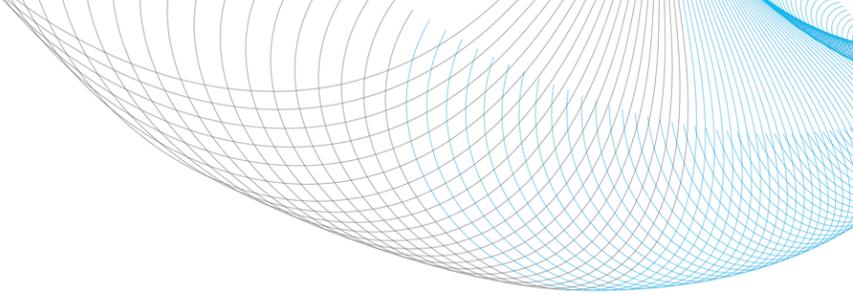


WorldatWork’s *Telework 2011* survey (conducted in 2010) showed that in the wake of a 74 percent increase in the WAH population between 2005 and 2008, there was a small decline between 2008 and 2010 (460,000, when adjusted for the decline in the overall labor market).

Since ACS reports those who consider home their primary place of work and WorldatWork counts those who work at home at least one day a month, we won’t know what impact the recession had on multiple-day-a-week teleworkers until the 2010 ACS data is available.

What is clear is that while the recession may have slowed the rate of growth of telework, the 5-year picture shows significant growth.





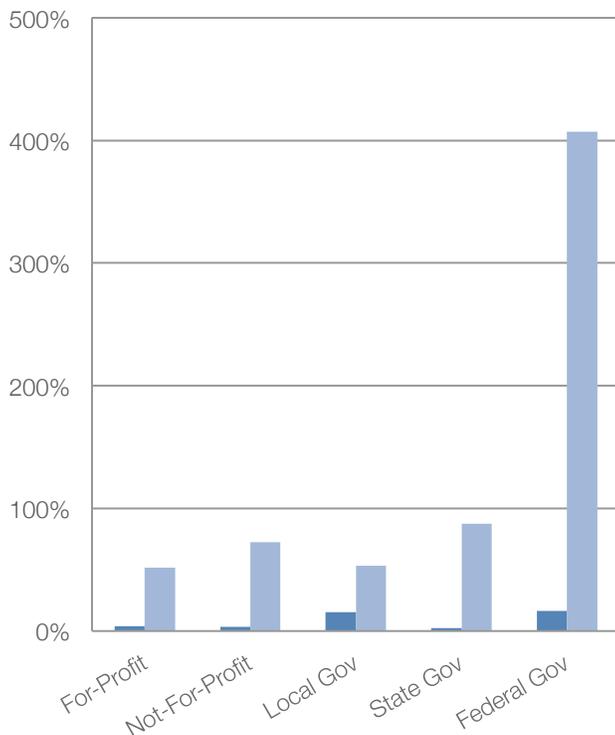
WAH BY CLASS OF WORKER

Across all types of workers, the WAH population grew disproportionately faster than the total workforce (Chart 2).

**Chart 2 - Workforce & WAH Growth
2005-2009**

Source: ACS PUMS Data

■ Total Workforce Growth ■ WAH Growth



In 2005, WAH employees totaled 1.5% of the non-self-employed population. By 2009, an additional 1.1 million WAH employees boosted that to 2.3% (Table 1, opposite).



Table 1 – 2005 and 2009 WAH by Class of Worker as a Percent of Total Workforce by Class of Worker

Class of Worker	2005	2009
Private For-Profit	1.6%	2.4%
Private Non-Profit	1.8%	2.7%
Local Government	0.7%	1.1%
State Government	1.4%	2.2%
Federal Government	0.7%	3.2%
Total	1.5%	2.3%

Source: 2005 and 2009 American Community Survey

The federal government has the highest percentage of WAH employees within their own population (see Table 1) though they only account for 5.2% of all WAH employees (see Table 2, next page).

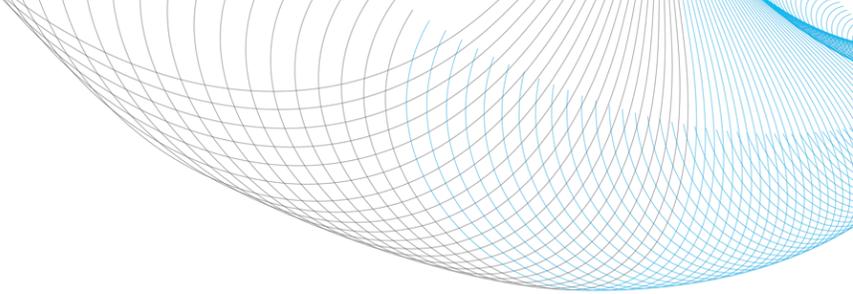


Table 2 – 2009 WAH Population by Class of Worker

Employee of:	#	% of WAH
Private For-Profit	2,225,497	76.0%
Private Non-profit	298,436	10.2%
Local Government	113,007	3.9%
State Government	138,801	4.7%
Federal Government	153,492	5.2%
Total	2,929,233	100.0%

Source: 2009 American Community Survey

Table 3 below shows that in 2005, employees of private for-profit companies accounted for over 80% of the regular WAH population. By 2009, largely due to greater adoption among federal workers, while their total numbers grew, the private for-profit sector share of WAH employees dropped to 76%.

Table 3—Work at Home

% of WAH Total by Class of Worker

Class of Worker	2005 % of WAH Total	2009 % of WAH Total
Private For-Profit	80.7%	76.0%
Private Non-Profit	9.5%	10.2%
Local Government	4.1%	3.9%
State Government	4.1%	4.7%
Federal Government	1.7%	5.2%

Source: 2009 American Community Survey

Private For-Profit Employees

In 2009, 2.2 million employees of private for-profit companies worked from home the majority of the time. They account for 76% of all WAH employees, but lag behind other employer categories in terms of participation rates. And, in part because it's harder to achieve a percentage increase in a large number than it is in a small one, the for-profit employer population also showed the slowest 5-year growth (51.6% - see Chart 2 on page 9).

Private Non-Profit Employees

About 300,000 non-profit employees called home their primary place of work in 2009. They were 10.2% of the WAH population, and posted the largest growth among the various employer categories during the recession. This is perhaps because non-profit organizations suffered more than others did during the recession, losing both patrons and investment earnings, and they responded by turning to more efficient and effective WAH arrangements.

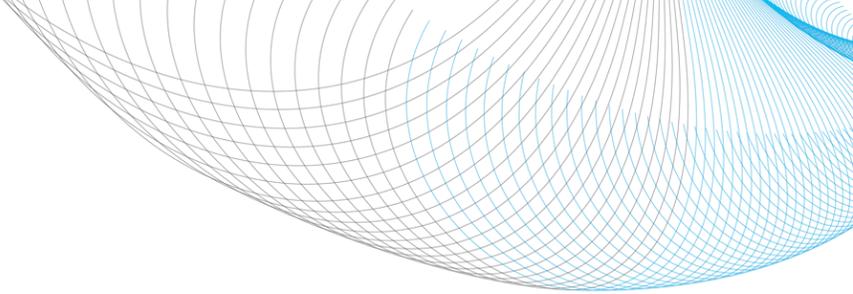
Local and State Government Employees

Local and state government employees together accounted for 8.6% of the WAH workforce. They represent the lowest rates of participation among the various classes of workers. Some states, including Georgia, Virginia, and Arizona, have passed legislation to increase WAH within their workforce, but the majority of states have not.

Federal Employees

The WAH standout, in terms of both growth and participation rates, was the federal workforce. In part for the same reason the largest group grew the slowest, the smallest group grew the fastest.

Federal employees who considered home their primary place of work totaled only 30,000 in 2005. By 2006, that number had grown by over 400%, though little progress has been made since that time (see Discussion Section for details). According to ACS data, 3.2% of federal employees called home their primary place of work in 2009. By the government's own count, while 61% of the 2 million



federal workers were considered eligible for telework, only about 100,000, or 5.2% of them did.

Though the federal workforce participation rate is higher than the rate of all other classes of workers, it's surprisingly low considering that since 2000 a federal mandate has required that every U.S. government employee work from home to the maximum extent possible.

The original driving force for WAH among federal workers was the threat of a bird flu pandemic. Since then, Hurricane Katrina, 'Snowmageddon', Swine Flu, and other crises have bolstered the government's resolve to make telework a continuity of operations (COOP) necessity.

In the current administration, the push for more federal telework has moved beyond COOP. Referring to himself as the Teleworker in Chief in his early days in office, President Obama has lobbied for telework.

In December of 2010, the Telework Enhancement Act passed through both houses of Congress with bipartisan support. While no funding was provided in the bill, agencies have been charged to:

- Designate a senior manager to coordinate the agencies' telework program
- Determine eligibility of employees, notify them of their eligibility status, and enter into written agreements with them for those who wish to telework
- Develop and implement telework training programs for managers and employees

The Office of Personnel Management's Director, John Berry, couldn't have been clearer about his and the current administration's support for telework in the agency's annual report on the status of telework to Congress:³

" . . . I believe telework must be implemented with a focus on accountability. As the President said at his White House Forum on Workplace Flexibility last March, 'It's about attracting and retaining top talent in the federal workforce and empowering them to do their jobs, and judging their success by the results that they get—not by how many

meetings they attend, or how much face-time they log...' Presenteeism, the practice of sitting at one's desk without working, can be just as problematic as absenteeism. I am an adamant supporter of telework because workers in an effective telework program can only be judged by their results. Those who can't perform and can't improve can't hide behind their desks. It is up to management to give our employees clear direction and support, and then trust them to deliver." —Message from the Director, 2010 Status of Telework in the Federal Government.

While progress has been slow, federal telework is beginning to take hold. In 2010, the Patent and Trademark Office reported that 55% of its workforce teleworks on a regular basis. At the National Mediation Board, 43% do so.⁴

While the Telework Enhancement Act has no real teeth in terms of sanctions for non-compliance, taken together with other Presidential directives that call for increased sustainability, better continuity of operations, transition to telework-compatible technologies, and reductions in real estate footprints, we expect to see some real strides in federal telework in the years ahead.

WAH AS A COMMUTER ALTERNATIVE

As a primary means of transportation, *not* traveling at all now accounts for 2.3% of the non-self-employed employee workforce (see Chart 3), and is growing at a far greater rate than all other modes.



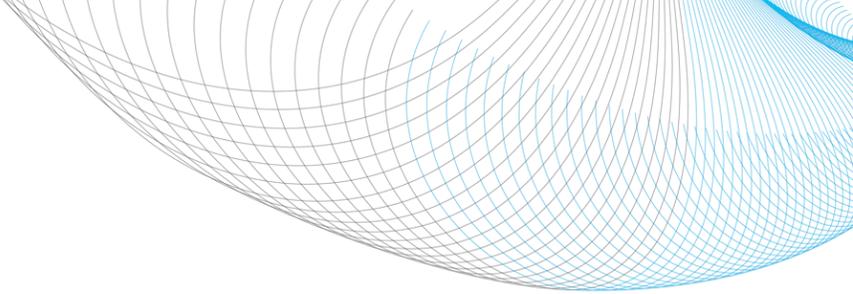
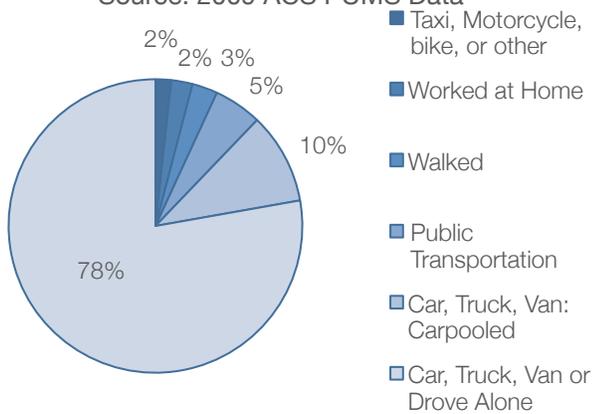


Chart 3 - Means of Transportation

Source: 2009 ACS PUMS Data



In a quarter of the nation's largest 20 metropolitan areas, more people work at home than travel to work via public transportation, walking, taxi, motorcycle, or bike (Table 4).

Table 4—Metro Areas Where WAH Exceeds Commuter Use of Public Trans., Walking, or Taxi/Motorcycle/Bike (ordered by size)

- Dallas-Fort Worth-Arlington TX
- Phoenix-Mesa-Scottsdale AZ
- Detroit-Warren-Livonia MI
- San Diego-Carlsbad-San Marcos CA
- Tampa-St. Petersburg-Clearwater FL

Source: 2009 ACS PUMS Data among populations > 1 million

Top WAH Metro Areas

At the national level, the WAH population grew almost 12 times faster than the general population. In some areas, such as Riverside, CA, and Tampa, FL, it grew even faster.

Table 5 shows the 10 metro areas with the fastest WAH growth relative to their total workforce, and the actual WAH growth within those areas.

Eleven of the nation's 15 largest metropolitan areas have a higher percentage of people working from home than the national average of 2.3%. The San Diego-Carlsbad-San Marcos area topped the list with 4.2% of the population working from home most of the time. Detroit and Houston tied for the bottom slot (Table 6, next page).

Table 5—Largest WAH Growth Compared to Workforce Growth

Metro Area	% Growth	Compared to Workforce
Riverside-San Bernardino-Ontario, CA	76.6%	25.5x
Tampa-St. Petersburg-Clearwater, FL	55.0%	18.4x
Salinas, CA	37.5%	18.1x
Chicago-Naperville-Joliet, IL-IN-WI	49.0%	14.1x
San Jose-Sunnyvale-Santa Clara, CA	129.6%	13.4x
Portland-Vancouver-Beaverton, OR-WA	56.6%	11.6x
Pittsburgh, PA	41.8%	9.7x
Minneapolis-St. Paul-Bloomington, MN-WI	34.5%	9.6x
Los Angeles-Long Beach-Santa Ana, CA	38.0%	9.6x
Phila-Camden-Wilmington, PA-NJ-DE-MD	56.2%	9.3x
Phoenix-Mesa-Scottsdale, AZ	65.2%	8.9x

Source: 2005 to 2009 ACS PUMS Data
Rank by growth is relative to the total population growth among areas with populations > 1,000,000

Table 6— % WAH in 15 Largest Metro Areas
Source: 2005 to 2009 ACS PUMS Data

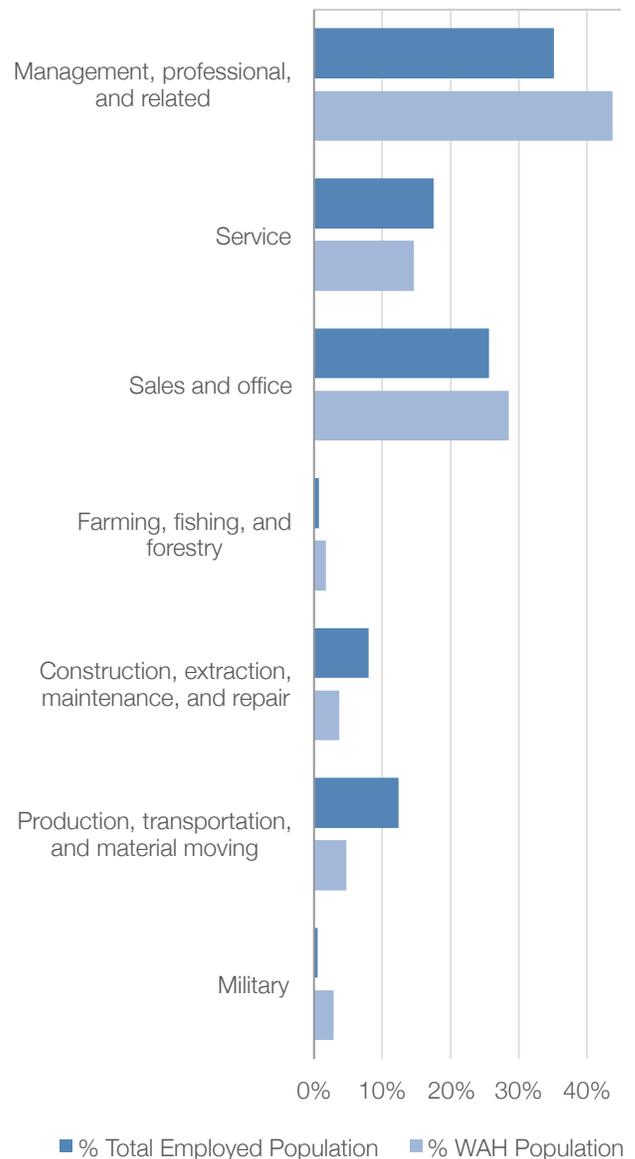
San Diego-Carlsbad-San Marcos, CA	4.2%
Atlanta-Sandy Springs-Marietta, GA	3.4%
San Francisco-Oakland-Fremont, CA	3.1%
Seattle-Tacoma-Bellevue, WA	3.0%
Phoenix-Mesa-Scottsdale, AZ	2.9%
Riverside-San Bernardino-Ontario, CA	2.7%
Dallas-Fort Worth-Arlington, TX	2.6%
Los Angeles-Long Beach-Santa Ana, CA	2.6%
Washington-Arlington-Alexandria, DC-VA-MD-WV	2.6%
Boston-Cambridge-Quincy, MA-NH	2.5%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	2.4%
Minneapolis-St. Paul-Bloomington, MN-WI	2.3%
Chicago-Naperville-Joliet, IL-IN-WI	2.3%
New York-N. New Jersey-Long Island, NY-NJ-PA	2.1%
Houston-Sugar Land-Baytown, TX	1.8%
Detroit-Warren-Livonia, MI	1.8%

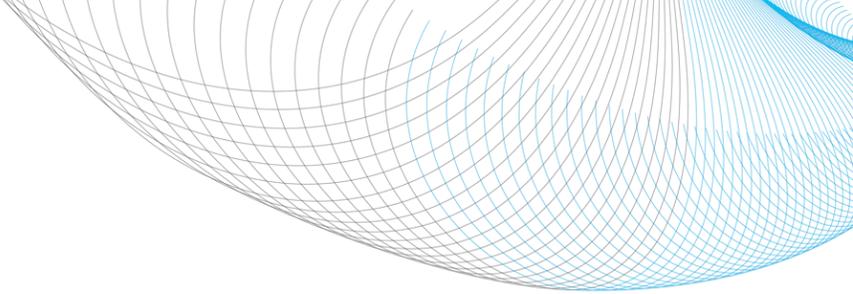
Source: 2009 ACS PUMS Data

WHO WORKS AT HOME?

More than 70% of the WAH population holds management, professional, sales, and office jobs (compared to 61% of the total workforce; see Chart 4, opposite).

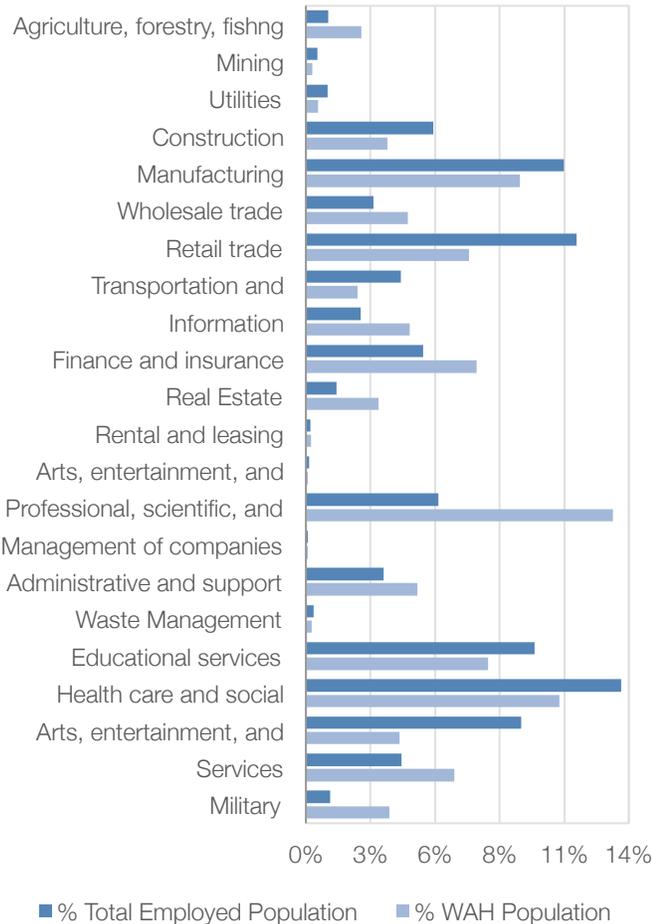
Chart 4 - By Occupation, % Total Employed Population Compared to % WAH Population
Source: 2009 ACS PUMS Data





While their numbers are fewer, WAH now has a significant presence across occupations and industries as well (see Charts 4 and 5) because most jobs, even manufacturing, now involve some knowledge work. Thanks to technology, many in non-traditional WAH occupations and industries can now work remotely.

Chart 5 - By Industry, % Total Employed Population Compared to % WAH Population
Source: 2009 ACS PUMS Data

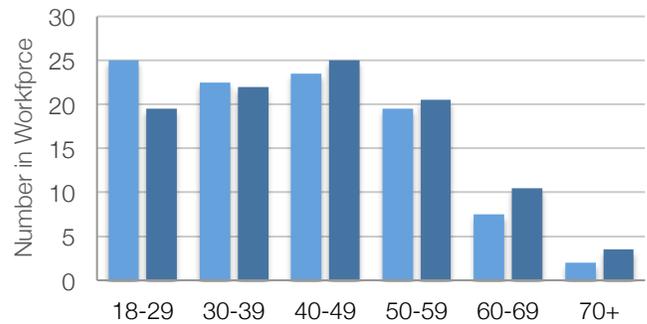


AGE

ACS data suggests that those who WAH are older than the average worker. The greatest proportional difference is among those over 60 (see Chart 6).

This suggests that workplace flexibility is favored by Baby Boomers, perhaps as a way to slowly edge into retirement. It debunks the concept that WAH and workplace flexibility are only suited to younger, more tech-savvy employees. And it challenges the myth that flexibility is just for women with children.

Chart 6 - Telworkers by Age
Source: 2009 ACS PUMS Data



Whether the age skew is a result of who chooses to work flexibly or who's chosen to can't be determined from the data. Likely two factors are at play here. First, senior workers have had more time to earn the trust that's essential to telework. Second, they are less likely to be concerned that opting to work flexibly will impact their advancement, a concern that's frequently cited by younger workers.

INCOME

Over three-quarters of WAH employees earn over \$65,000 a year, putting them in the 80th percentile relative to the total workforce. While some industries, such as the call center industry offer WAH to the minimum wage workers, most still treat it as a privilege (see Chart 7, next page).

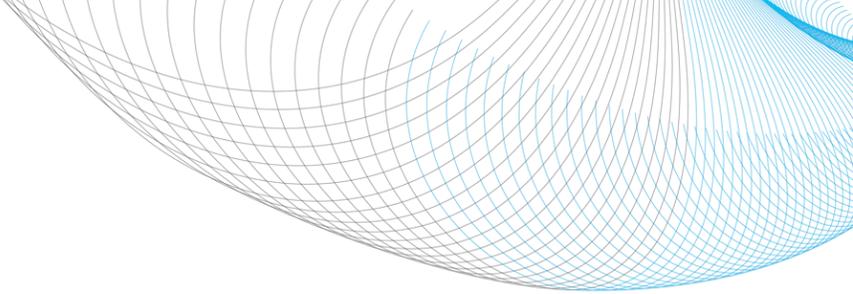
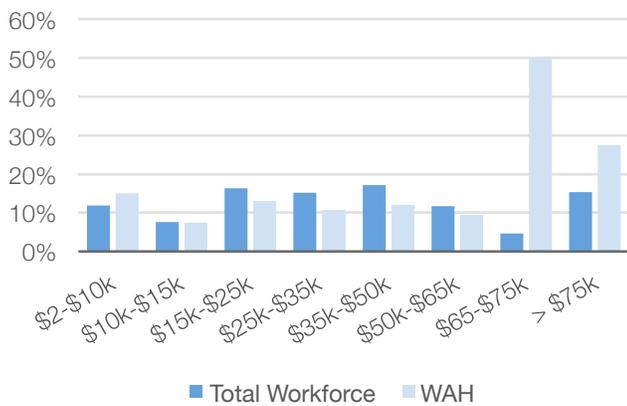


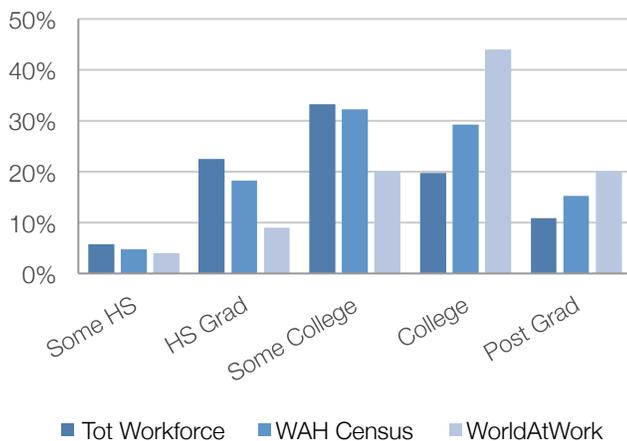
Chart 7 - Income Distribution Comparison
Source: 2009 ACS PUMS Data



EDUCATION

Most employees who work at home have at least a college degree, and a significant percentage have a post graduate degree. Again, this reinforces the observation that WAH jobs are not equally available to all workers (see Chart 8).

Chart 8 - Education Comparison
Source: 2009 ACS PUMS Data



THE SELF-EMPLOYED

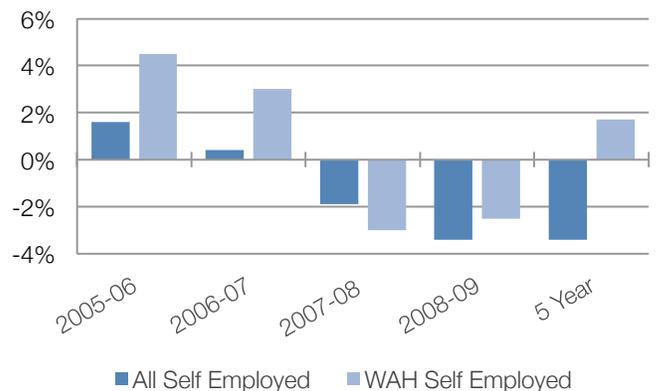
While not the primary focus of this paper, since most government reports (and therefore the media) lump the self-employed in with the rest of WAH population, it's important to understand the impact of their numbers.

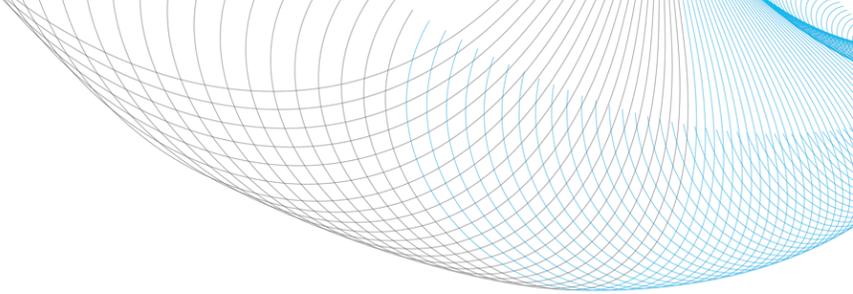
A fifth of all self-employed people work from home. They represent half of those who consider home their primary place of work and are an important part of the economy and the WAH population. However, the industries they represent, their motivations, and their demographics are very different from those of the employee WAH population.

On a five-year basis, the WAH segment of the self-employed population grew only slightly (1.7%). When their numbers are combined with the non-self-employed WAH population, the combined growth totaled only 23%, compared to the 61% growth of WAH without the self-employed.

The recession was not as kind to WAH business owners as it was to the employee WAH population. Both the total self-employed population and the WAH portion lost ground in 2008 and 2009 (see Chart 9).

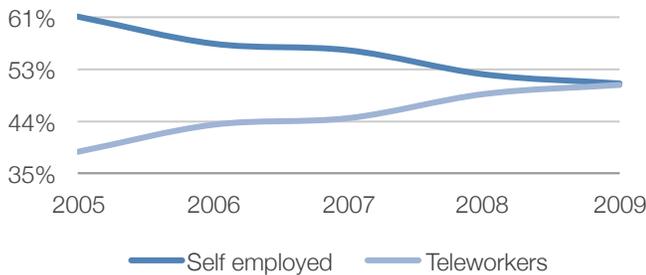
Chart 9 - 2005-2009 Self Employed Population
Source: 2005 to 2009 ACS PUMS Data





Largely as a result of the increase in the employee WAH population, the self-employed share of the WAH population fell from over 60% to 50% during the past five years (see Chart 10).

Chart 10 - Self Emp. vs Employees, WAH Trend
Source: 2009 ACS PUMS Data



WHO OFFERS WAH JOBS?

Data on who offers work at home comes from two sources, the Bureau of Labor Statistics National Compensation Survey and WorldatWork.

Bureau of Labor Statistics (BLS) conducts an annual National Compensation Survey that includes questions about the benefits offered by companies.¹ To be counted as a benefit, it must be permanent and widely available.⁶ The BLS count does not include ad hoc, occasional, and informal WAH programs, which WorldatWork shows to be, by far, the most common approach.

BLS SUMMARY OF WHO OFFERS WAH

In 2010, only 5% of companies reported offering flexible workplace benefits (see Table 7, opposite). That number has changed only one percentage point since 2003 (the first year of the survey).

Table 7 — % of Workforce Offered Flexible Workplace Benefits

Category	2007	2010
Private Companies	5%	5%
Company Size		
100+ Employees	5%	7%
Less than 100 Employees	3%	4%
Occupation		
Management, Professional & Related	5%	5%
Service	3%	4%
Sales & Office	11%	13%
Natural Resources, Construction & Maint.	1%	9%
Production, Transp., and Material Moving	5%	5%
Union vs. Non-Union		
Union	n.a.	1%
Non-Union	n.a.	5%
Blue Collar vs White Collar		
Blue-Collar	2%	2%
White-Collar	5%	6%
Wage Percentile		
Lowest 25 Wage Percentile	n.a.	1%
Second 25 Percentile	n.a.	3%
Third 25 Percentile	n.a.	6%
Highest 25 Percentile	n.a.	12%

Source: 2010 BLS National Compensation Survey

Again, the reason for this startlingly low number likely lies in the BLS's strict guidelines for inclusion as a benefit.

Within the population of those who offer flexible workplaces, the BLS data shows (see Table 7):

- ▶ Larger companies offer flexible workplaces more than smaller ones do.
- ▶ Such arrangements are five times more common in non-union establishments, and three times more available to white-collar versus blue-collar workers.
- ▶ There is a linear relationship between the availability of flexible workplace options and wages through the third 25th percentile—the higher the wage, the more likely the availability. But the highest wage earners are twice as likely to have access to workplace flexibility than the those in the third percentile are, and 12 times more likely than those in the lowest wage group.

WORLDATEWORK SUMMARY OF WHO OFFERS WORK AT HOME

WorldatWork's *2011 Survey on Workplace Flexibility*⁷ offers insight into ad hoc, occasional, and informal WAH practices of its members. To answer the question about which types of flexible work arrangements members offered to some or all employees, WorldatWork found:

- ▶ 83% offered it on an ad hoc basis (to meet a repair person, care for a sick child, etc.)
- ▶ 58% offered it a least one day a month, but not full time
- ▶ 57% offered it at least one day a week, but not full time
- ▶ 37% offered it full time

WAH Availability by Exempt vs. Non-Exempt

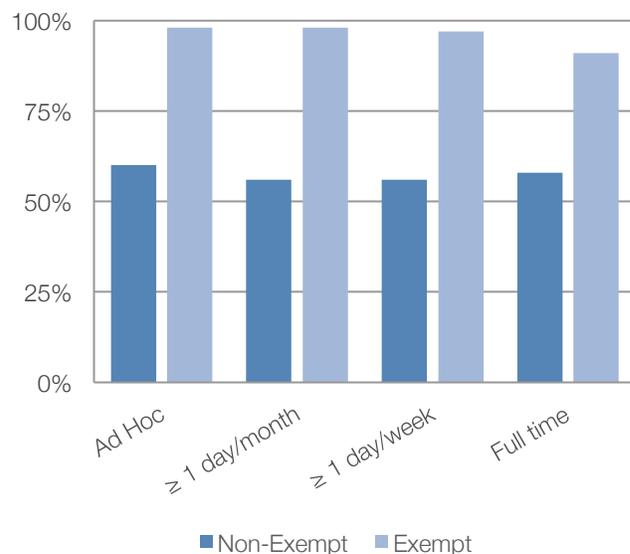
When asked if they made WAH available to all employees, the majority did not. All forms of telework were significantly more available to exempt than non-exempt employees (see Chart 11)

- ▶ 48% offered it ad hoc
- ▶ 29% offered it at least once a month
- ▶ 28% offered it at least once a week
- ▶ 16% offered it full time

WAH Availability by Company Size

In terms of company size, those with 10,000 or more employees were significantly more likely to offer telework at

Chart 11 - Exempt vs. NonExempt
Source: WorldatWork 2011 Survey of Workplace Flexibility



least one day a month to some or all employees than smaller companies (72-73% versus 52-62%).

Companies with less than 100 employees or those with 10,000 to 20,000 employees were nearly equal in their offering of telework once a week (63% and 64% respectively). The largest companies (those with over 20,000 employees) were the most likely to do so (77%).

For the most part, the larger the company, the more likely they are to offer full-time telework (offered by 56% of the largest companies and 25% of the smallest).

WAH Availability by Type of Organization

The extent to which WorldatWork's member companies offered telework to at least some employees varied by type of company, with non-profit organizations offering regular and full-time telework more than any other sector. Publicly held companies were the second most likely to offer it on a regular basis (see Chart 12).

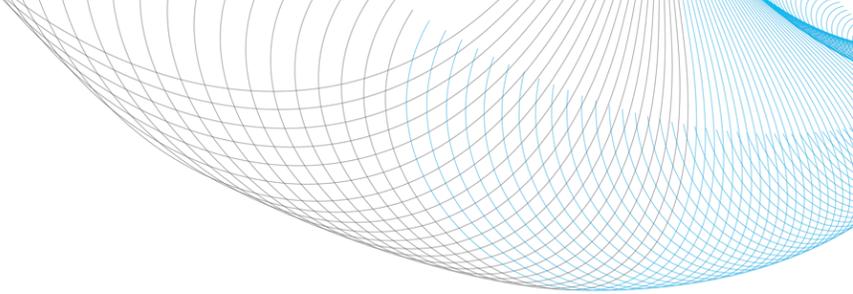


Chart 12 - Telwork Offerings by Type of Organization
 Source: 2011 WorldatWork Survey of Workplace Flexibility

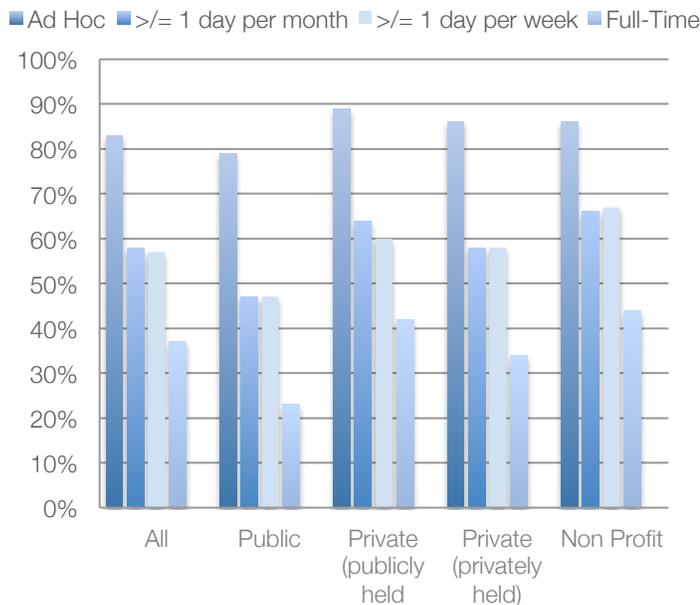
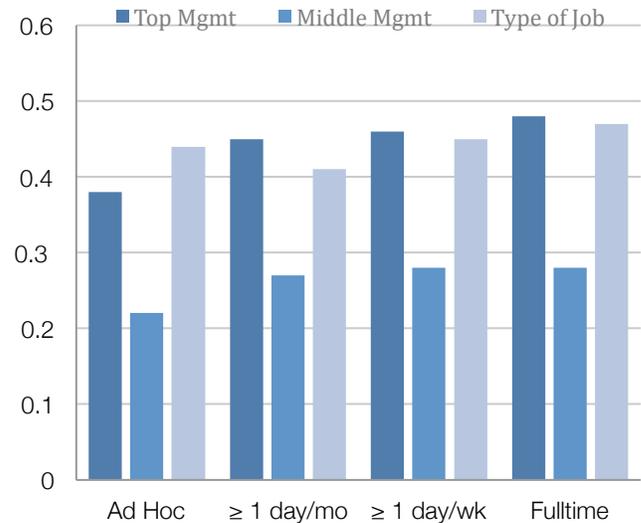


Chart 13 - Obstacles to Telework
 Source: 2009 WorldatWork Telework Trendlines



WAH Availability by Industry

Full-time telework was most prevalent in finance/insurance and healthcare/social assistance industries (60% and 55% respectively). It was least available in the manufacturing industry—though still significantly offered at 24%. This challenges the commonly held theory that only service sector jobs are compatible with full-time telework. You have to look at the work itself to understand if it is compatible with WAH.

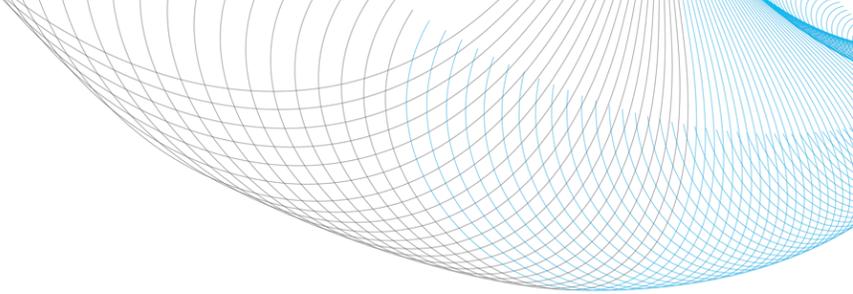
Obstacles to Offering Work at Home

When asked to indicate the primary obstacles to telework (among those who did not offer it), management resistance was overwhelmingly cited as the most common holdback. Job incompatibility was second (see Chart 13).

This data is consistent with a wide body of research that shows that while interest in WAH (of any frequency) is very high among employees and more than half of jobs are conducive to it, management resistance remains the biggest obstacle to WAH.

HOW OFTEN DO THEY WORK AT HOME?

BLS data showed a 28% increase in the number of employees who reported working at home (either as part of their regular workday or working after hours) from 2005 to 2009.



The average number of hours worked at home has been stable at about 2.5 hours a day since 2008 (see Table 8).

Table 8—Employees Who Performed Work at Home

	2005	2006	2007	2008	2009
Employees	14.1m	15.6m	15.9m	16.4m	18.0m
% Change	2.2%	10.6%	1.9%	3.1%	9.8%
% of Pop.	15.4%	16.5%	16.0%	17.0%	17.0%
Avg hrs	2.19	2.27	2.55	2.50	2.50

Source: BLS Time Use Survey
Non-self-employed. Includes unpaid WAH.

Employees in management, professional, and related occupations worked remotely more than twice as many hours as other workers did, for a total of about 6.5 hours a week in 2007.⁸

While ancient in terms of how far technology has come, a 2004 special BLS supplement to the Current Population Survey showed the average number of paid WAH hours among those who have a formal WAH agreement to be equivalent to 2.4 days a week (see Table 9).⁹

Table 9—2004 WAH Hours of Work

Hours/Week	% Employees
Less than 8	21%
8 to 34	35%
35 or more	15%
Average	18.6 hours (2.4 days)

Source BLS Work at Home in 2004 special supplement

WorldatWork asked survey participants: “Thinking of your normal business hours, how frequently do you work only at home for an entire day?” In 2008, approximately 16 million answered with at least once a month. That number has increased by almost 62 percent since 2005 (see Table 10).

Table 10 5 Yr Growth of WAH at least once a month

2005	2010	5 Year Increase
9.9 million	16 Million	61.6%

Source: WorldatWork surveys 2005 to 2009

WorldatWork also found that teleworkers were doing so more frequently in 2010 than in 2008. Those who reported they teleworked almost every day grew from 40 to 45 percent. And those who did do at least once a week, increased from 32 percent to 39 percent. At the same time, teleworkers reporting they worked from home once a month declined from 28% to 16%.¹⁰ This shift may indicate that occasional telework is proving itself effective and reducing fears to the point that more frequent participation is accepted. Alternatively, it might indicate that the fringe teleworkers went back to the office during the recession while the more frequent participants—those who’d proven the savings potential, expanded their telework days.

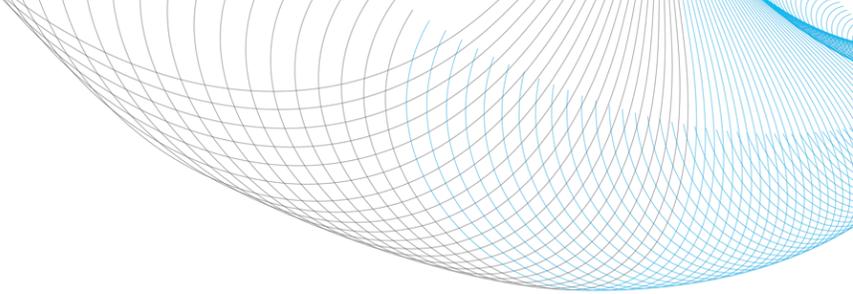
WHERE DO THEY WORK?

In 2007, BLS compiled a special tabulation about where people worked. It showed that about 7.5% of work was performed at home and 2.9% was performed in other places. Again, those in managerial, professional, and related occupations did more at home (12.8%) and other places (3.5%) than other employees in other occupations.¹¹

The latest BLS data does not include other places of work, but it does show a decrease in work conducted at an office from 90% in 2007 (a number that had changed little since 2003) to 87% in 2009.¹²

The second most common work location was home. On days they worked, nearly one in five employed people spent at least some time working at home (again, this includes a mix of paid and unpaid work).

Only about 3% of all work hours were performed at other locations, such as a restaurant, someone else’s home, or outside.



WorldatWork found similar numbers. They asked participants: “Indicate whether you have ever conducted work-related activities at any of the following types of locations over the past month.” Home was, by far, the most cited non-traditional place of work (63%).¹³ The second most frequently cited location was in the car (40%). Other favored ad hoc offices included automobiles, eateries, and hotels (see Chart 14).

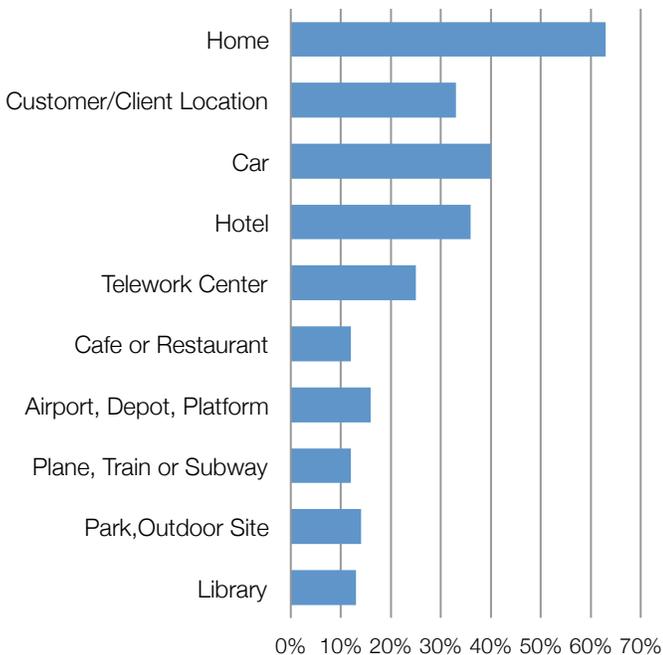
WHO WANTS TO WORK AT HOME?

While the question was not repeated in 2011, WorldatWork’s 2009 *Telework Trendlines* showed that 50% of

non-telecommuters rated the chance to WAH as four or five on a scale where five meant they were very interested in working from home. Only 21% said they would not be interested at all. Thirty-seven percent said they’d take a small pay cut in exchange for being able to work at home two days a week.¹⁴

There are also some groups of people for whom being able to telework is more critical. These include the disabled, those with eldercare responsibilities (a rapidly growing group), military families, and rural workers.

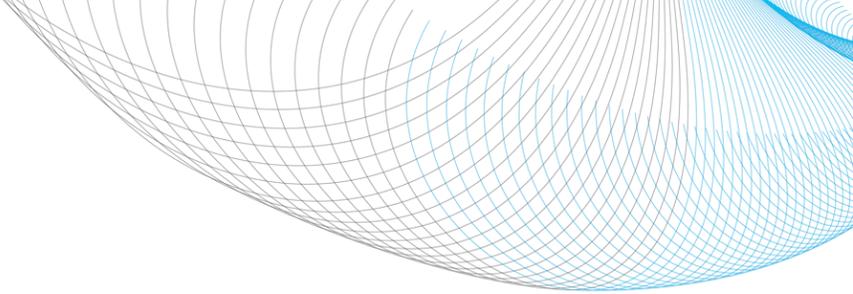
Chart 14 — Remote Work By Location
Source: WorldatWork Telework 2011



WHO COULD WORK AT HOME?

Insight into this question of who could work at home can be gleaned from a number of studies:





1) The WorldatWork 2011 Survey on Workplace Flexibility suggested that employers felt that between 41% and 47% of jobs were compatible with WAH.¹⁵

2) WorldatWork's 2009 Telework Trendlines shows that the 38% of those who did not telecommute felt they had job-related tasks that could be done at home. Respondents most commonly answered that they felt they could do up to 40% of their job at home, though almost a quarter felt they could do 80% or more remotely.¹⁶

3) In 2005, researchers Matthews and Williams (M&W) estimated the potential WAH population at 40% of the workforce (based on 2002 BLS totals).¹⁷ They did so by determining which U.S. jobs were telework compatible, which they defined as:

- ▶ Having an information component
- ▶ Being individual vs. group work
- ▶ Having clear parameters for evaluation
- ▶ Not requiring personal contact with customers
- ▶ Not requiring physical work that could only be done on site

On this basis, they included professional specialty, technical support, administrative support, and half of sales jobs (assuming that half were non-retail). They excluded management positions altogether, assuming (incorrectly) that "managers would not be teleworking in the near future."

We repeated Matthews and Williams approach using 2010 Labor Force numbers with the following modifications:

- ▶ We included a small portion of the populations where there were already people working at home in occupational categories that were not included in M&W's estimate. For service and production/transportation occupations, we assumed 5% compatibility. For construction and maintenance, we assumed 10%.
- ▶ For the government workforce, we assumed 61% of jobs were compatible based on the Department of Labor's 2009 Report to Congress.¹⁸
- ▶ For management jobs, we assumed 50% compatibility.

The result of our analysis shows that about 63 million U.S. employees hold jobs that could be done at home at least part of the time (45% of the workforce).

Taken together with the conclusions about who wants to work at home, we arrive at a total of about 50 million people as a theoretical maximum for WAH (see Table 11 and Chart 16). That accounts for 36% of the total workforce or 40% of the non-self-employed workforce.

Table 11 – Breakdown of 63 Million Who Could WAH

	#	% could WAH
Could, wants to, but doesn't	30.4 M	49%
WAH 1-5 days/month	16.0 M	25%
WAH 3-5 days/week	2.9 M	5%
Doesn't want to	13.4 M	21%

Sources: Telework Research Network, WorldatWork 2011 Telework Survey, 2009 American Community Survey

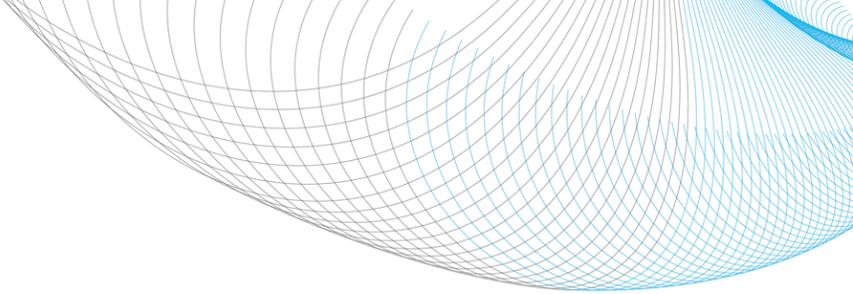
PROJECTED GROWTH

Over the years, many experts have put forth their predictions for growth of telework.

In 2005, Gartner Dataquest predicted that by 2008 thirty-six million U.S. employees would telework at least once a month (27% of the worker population) and 13 million would work from home at least once a week (10% of the population).¹⁹

In 2009, Forrester Research reported, "more than 34 million U.S. adults telecommuted at least occasionally." They added:

"Fueled by broadband adoption, better collaboration tools, and growing management experience, the U.S. telecommuting ranks will swell to 63 million by 2016. Those 29 million new telecommuters lined up five abreast would



stretch from New York to LA! Leading the surge are occasional telecommuters and regular telecommuters who work from home between one and four days a week. The impact of this expanding remote workforce is far-reaching: It will force firms to expand their digital footprints, harness new social software, crisply define their culture, and examine their real estate and energy policies.”²⁰

In February of 2011, *Fortune Magazine* reported that 82% of companies that made its annual “100 Best Companies to Work For” list allow employees to telecommute or work at home at least 20% of the time.²¹

There is no doubt that remote work will continue to grow. And there’s no doubt that it will soon begin to grow more quickly as a result of a number of factors, including:

- ▶ Ever improving communications and collaboration technologies
- ▶ Increased high-speed broadband penetration
- ▶ The proliferation of web-based applications
- ▶ A return of labor and talent shortages that were of key concern prior to the recession
- ▶ The needs and wants of an increasingly tech-savvy labor force
- ▶ The desire for flexible work among retiring Baby Boomers
- ▶ Record-low levels of employee engagement
- ▶ Workforce burnout—a factor that was already a problem before the recession, but even more so now as a result of it
- ▶ The increasing pressure on working adults to care for aging parents
- ▶ Increasing sophistication about how to manage and work with distributed workers and groups of workers.
- ▶ The declining numbers of Baby Boom managers who are not comfortable with WAH workers as they head off into retirement.
- ▶ Continued pressures on companies for indirect costs of office space including real estate, design, management, and operations.
- ▶ Escalating fuel prices and continued unrest in the Middle East

- ▶ Increasing pressure on companies to reduce their carbon footprint, including the likelihood of financial sanctions
- ▶ Continued emphasis on cost containment and bottom line performance
- ▶ The growing recognition of flexibility as a corporate strategy, not just an HR tactic
- ▶ Continual reminders of WAH as a continuity of operations strategy
- ▶ Growing concerns about our underfunded and under-maintained transportation infrastructure
- ▶ Federal budget pressures and government mandates for the federal workforce including the Telework Act and others on sustainability, continuity of operations, technology replacement cycles, real estate management, cloud computing and others.

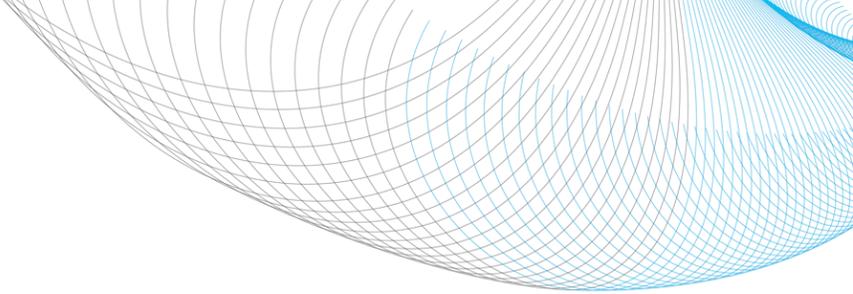
The question remains: how quickly will remote work grow?

Clearly, ad hoc and occasional WAH will lead the way. More than 16 million people already work remotely at least once a month. Based on the historical growth rate reported by WorldatWork (roughly 12% per year), without any acceleration, that number will reach the theoretical maximum of 50 million people by 2018.

If we similarly project the regular WAH population growth, account for projected changes in the labor force, and assume it continues to grow at its historical growth rate, the regular WAH population would total 4.9 million by 2016, a 69% increase over its current level—but still a very small portion of the workforce and well below the forecasts of others.

CONCLUSIONS

While we acknowledge the barriers to widespread telework, it’s an interesting exercise to project what it would mean if the 50 million potential telecommuters in the U.S. worked from home on a regular basis (half time). Based on our Telework Savings Calculator™, the collective company, community, and individual savings would total over



\$900 billion a year. The financial and non-financial benefits would include:

BUSINESSES WOULD:²²

- ▶ Save over \$13,000 per person
- ▶ Increase productivity by over \$466 billion—6 million man-years
- ▶ Save \$170 billion in real estate and related costs (assuming a 20% reduction)
- ▶ Save \$28 billion in absenteeism (25% reduction) and turnover (10% reduction)
- ▶ Improve continuity of operations
- ▶ Avoid environmental sanctions, city access fees, etc.
- ▶ Reduce their energy costs and carbon footprint
- ▶ Improve work-life balance and better address the needs of families, parents, and senior caregivers
- ▶ Avoid the ‘brain drain’ effect of retiring Boomers by allowing them to work flexibly
- ▶ Be able to recruit and retain the best people

INDIVIDUALS WOULD:²³

- ▶ Achieve a better work-life balance
- ▶ Recoup almost a week of free time per year—time they’d have otherwise spent commuting
- ▶ Save \$2,000-\$6,700/year, not including daycare and eldercare costs or reduced car insurance premiums
- ▶ Suffer fewer illnesses

THE NATION WOULD:²⁴

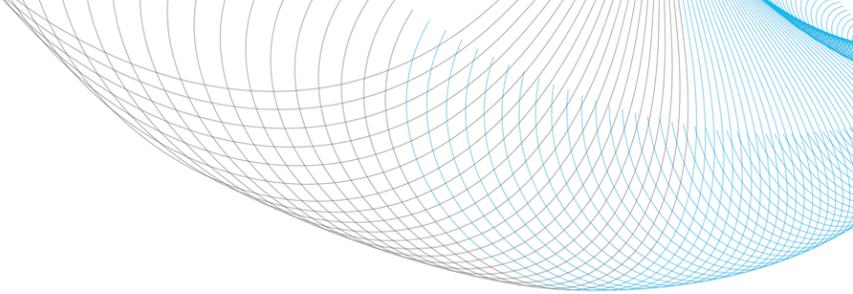
- ▶ Save 281 million barrels of oil a year (\$28 billion/year at \$100/barrel)—the equivalent of 46% of our Persian Gulf imports
- ▶ Reduce greenhouse gases by 51 million tons/year—the equivalent of the entire New York state workforce off the roads

- ▶ Reduce road travel by 91 billion miles/year thereby reducing the strain on our crumbling transportation infrastructure
- ▶ Reduce road congestion and increase the productivity for non-telecommuters
- ▶ Save 77,000 people from traffic-related injury or death
- ▶ Improve emergency responsiveness
- ▶ Reduce pollution from road work and new office construction
- ▶ Reduce the offshoring of jobs and homeshore some that have already been lost
- ▶ Provide fuller employment opportunities for special populations include rural workers, the disabled, and military families
- ▶ Reduce the economic and political vulnerability that stems from our dependence on foreign oil
- ▶ Reduce terrorism targets of opportunity

More than a dozen state and federal legislative initiatives aimed at encouraging telework have been introduced in the past three years. Many have been enacted. Federal transportation monies already fund a handful of state and local advocacy programs. While this is encouraging, unless a coordinated approach to telework is taken, well-intended initiatives risk duplication of effort and cost. Moreover, without a good understanding of who is already teleworking, it will be impossible to measure the success or return on investment of new programs.

THE FEDERAL GOVERNMENT SHOULD:

- ▶ Develop cross-agency initiatives to foster state and local telework advocacy programs. DOE, EPA, DOT, DOL, SBA, VA, CDC, the Council on Disability, NSA, DOI, DOD, and even SSA all have something to gain from telework.
- ▶ Specifically include telework as a valid transportation demand management and pollution reduction strategy in the nation’s transportation and energy policies.
- ▶ Collect data from those state and local advocacy programs that have already proven successful. TeleworkVA, for example, has a program that offers cash incentives to



companies that allow their people to work from home. Other successful models are offered by the federal government's own telework programs, The Telework Exchange, TelecommuteConnecticut, Commuter Challenge in Seattle, 36 Commuting Solutions in Denver, M-ATAC in Washington DC, TelCoa, WORKShiftCalgary, the Sloan Work and Family Network, and dozens of private practitioners. Sharing information about what has already been tried and what has worked can save substantial expense.

- ▶ Agree on a universally accepted method of verifying and measuring telework participation. This is particularly important as public monies are used to fund programs and as city access fees, commuter taxes, carbon reporting, and environmental sanctions become realities.
- ▶ Provide funding for the implementation of the Telework Enhancement Act of 2010. Passed with bipartisan support, this legislation is intended to increase telework participation within federal agencies, but as no funding was associated with the bill, many agencies are finding it impossible to comply.
- ▶ Establish a public-private partnership within SBA to help small private sector companies evaluate and implement telework.
- ▶ Encourage states and local governments to support telework for their own employees and to encourage private sector adoption. Progress toward telework goals should be included in agency head and managers performance evaluations. Best practices and vendor assessments should be openly shared between government agencies to avoid duplication of effort and ensure that poor performing vendors are not hired elsewhere (think Yelp for government). Essential telework fundamentals such as IT and organizational readiness assessments and telework training (for agency leaders, managers, employees) should be required for all programs using federal funds to ensure that programs are not set up for failure. Pre- and post-telework metrics should be captured to accurately evaluate program success.
- ▶ Include questions in future American Community Surveys that allow researchers to easily distinguish home-based employees, home-businesses, volunteers, and unpaid family workers across all variables. In addition, questions should be added to account for mobile employees and to

determine where and how often each class of worker is working remotely.

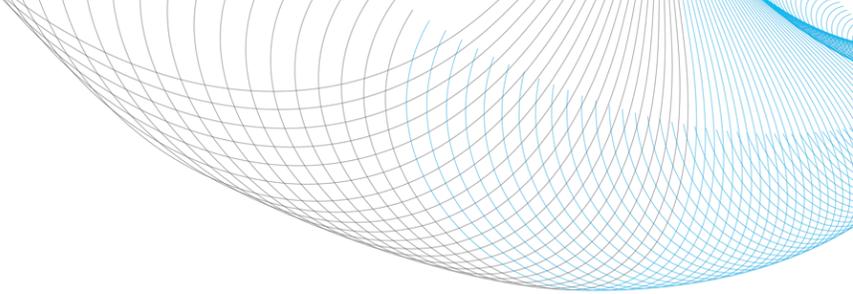
- ▶ Make ubiquitous high-speed broadband access a priority. Without uniform access, telework will not be available to those who need it the most.
- ▶ Require that state and local taxing authorities abolish policies that double-tax home-based workers. New York's 'telecommuter tax' may explain why the NY metro region's telework participation rate is so low.
- ▶ Offer partial home office tax credits for people who work from home part time and allow WAH employees to deduct their home office equipment costs.
- ▶ Offer Small Business Innovation Grants (SBIR) to inspire technology that supports telework.
- ▶ Encourage the relaxation of local zoning laws that prohibit home-based work.
- ▶ Evaluate OSHA, Fair Labor Standards, ERISA, and other employer regulations that impact remote work.

DISCUSSION

WHY DO SOME METRO AREAS HAVE HIGHER CONCENTRATIONS OF TELEWORKERS THAN OTHERS?

We expected to find a positive correlation between areas with the worst congestion or those with the highest levels of 'extreme commutes' and high levels of telework, but didn't find such a relationship. We expected to find a correlation in places where there are telework incentives, but we didn't.

What we see most in the data are places with large populations of information workers—Detroit is at the bottom of the list for example. But there are many factors that might encourage or discourage telework. For example, a long period of highway maintenance in San Diego, coupled with a relatively limited public transportation system may have led to its work at home growth. And while New York is infamous for its traffic jams, its "telecommuter tax" (essen-



tially double taxation of telecommuters) most likely discourages participation.

The fastest growth areas may be a result of slow starters, an example of the "brilliant recovery from a piss poor start" effect. It's easier to achieve a large percentage increase in a small space than it is a large one.

WHAT CAUSED THE SURGE IN FEDERAL WORKERS TELECOMMUTING? IT'S OBVIOUSLY TOO EARLY FOR IT TO BE THE TELEWORK ENHANCEMENT ACT.

The huge growth (+400%) all came between 2005 and 2006. Until recently, continuity of operations was the primary driver of Federal telework. In 2005 both the Oklahoma City bombing and Hurricane Katrina were wake-up calls. In addition, in part because of Katrina—but also as a result of increased demand, fuel prices had been steadily rising. They crossed the \$3/gallon barrier in late 2005, and some people said, "Enough!" Oddly, the \$4/gallon barrier does not seem to have the same impact.

Here's the federal government's own take on the 2006 growth in telework among federal workers:²⁵

"In the wake of the devastation caused by Hurricane Katrina, we have seen the importance of telework in responding flexibly to emergency situations— in this case, by providing a tool to help alleviate the issues caused by steeply rising fuel prices nationwide. Additionally, Congress showed its continuing interest in telework in the Federal Government through the enactment of Public Law 108-447 in December of 2004, encouraging increased telework participation in certain agencies."

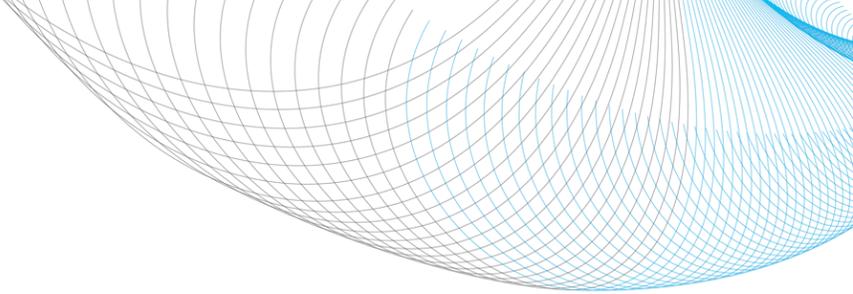
WHY IS YOUR FORECAST FOR THE GROWTH OF TELEWORK SO MUCH MORE CONSERVATIVE THAN THOSE OF OTHERS

Having worked with a number of companies and government agencies in the early stages of their telework pro-

grams, it's clear that the majority is not ready to make the organizational culture shift that's required to manage a remote workforce. The issue of mistrust—'how do I know they're working', is huge and not easily overcome. Management attitudes that were born in the days of sweatshops and typing pools still dominate. And even in those rare organizations where senior management unambiguously supports the concept, lack of middle management buy-in is the stumbling block.

Oddly, the fact that the majority of information industry employees are not at their desk most of the time, is something most companies don't want to acknowledge. The tools, training, and technologies that are needed to support telework, are really just a catch-up on how employees are working already.

While looming labor shortages, increased pressure from value chain partners and others to engage in sustainable practices, rising fuel prices, budget pressures and a variety of other factors will continue to make telework attractive, the cultural barriers will not be quickly overcome.



ABOUT

TELEWORK RESEARCH NETWORK

The Telework Research Network is a consulting and research firm based in San Diego, California that specializes in evaluating the business case for telework and other workplace flexibility strategies. They've built telework savings models for the US, UK, Canada, and the US federal workforce. Hundreds of company and government leaders have used their proprietary Telework Savings Calculator™ to evaluate the ROI of alternative workplace strategies.

The Telework Research Network's researchers have synthesized over 500 studies on telework and related topics. They've interviewed the nation's largest and smallest telework employers and their employees, the telework advocates and naysayers, top researchers, leaders of successful telework advocacy programs, and venture capitalists who have invested in the remote work model. Their research has been quoted in *Harvard Business Review*, *The Wall Street Journal*, and scores of other publications.

The Telework Research Network staff is available for consulting and research projects, custom telework and flexible work modeling for companies and communities, branded savings calculators, writing, and speaking.

Their research is conducted independently and made possible by their sponsors. Related white papers include:

[Telecommuting: The Bottom Line Impact](#)

[Performance Based Management](#)

[The Shifting Nature of Work in the U.K.](#)

Visit TeleworkResearchNetwork.com. For more information contact Kate@TeleworkResearchNetwork.com.

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NEW WAYS OF WORKING

New Ways of Working (NewWOW) is a membership organization of thought leaders from companies and academia exploring new ways of working such as distributed work, environmental sustainability and work, cross-cultural work, innovation, and productivity.

New WOW takes an integrated approach to workplace change, combining corporate real estate, human resources, and information technology. Members are an intriguing mix of experts from the fields of workspace design, technology and real estate/facilities. www.newwow.net



Endnotes

- 1 Telework 2011—A WorldatWork Special Report, based on data from The Dieringer Research Group, Inc telephone survey of 1,002 randomly selected U.S. adults conducted between Oct. 20, 2010, and Nov. 2, 2010
- 2 Survey on Workplace Flexibility, WorldatWork, February 2011. 5,191 members surveyed with 537 valid responses.
- 3 2010 Status of Telework in the Federal Government, U.S. Office of Personnel Management.
- 4 2010 Status of Telework in the Federal Government, U.S. Office of Personnel Management.
- 5 Bureau of Labor Statistics, 2007 and 2010 Annual Benefits Survey. 2010 included a sample of approximately 18,000 firms with 10,000 responding.
- 6 A 3-8-11 email from Natalie Kramer, Economist in the Office of Compensation and Working Conditions, National Compensation Survey Bureau of Labor Statistics offers this explanation of whether the flexible workplace benefit should be counted:

"This benefit is also known as flexiplace or telecommuting. It allows employees who traditionally work at the establishment to regularly work an agreed-upon portion of their work schedule at home or other approved location. Excludes temporary arrangements.

1) An employee with a chronic back problem for years expects no improvement. Arrangements are made for him to work at home 2 days a week indefinitely. If this arrangement is personalized for a specific individual, and other employees would not expect the same treatment under similar circumstances, the plan would be out of scope.

2) An employee's work involves review of documents on the computer and email with clients to resolve issues. Work can be done away from the office as long as the employee has computer access. The employee has production quotas to meet each day. The company allows the employee to work from home one day per week as long as the quotas are maintained. This is an in-scope arrangement because other than failing to maintain a quota, there is no indication that the arrangement is temporary.

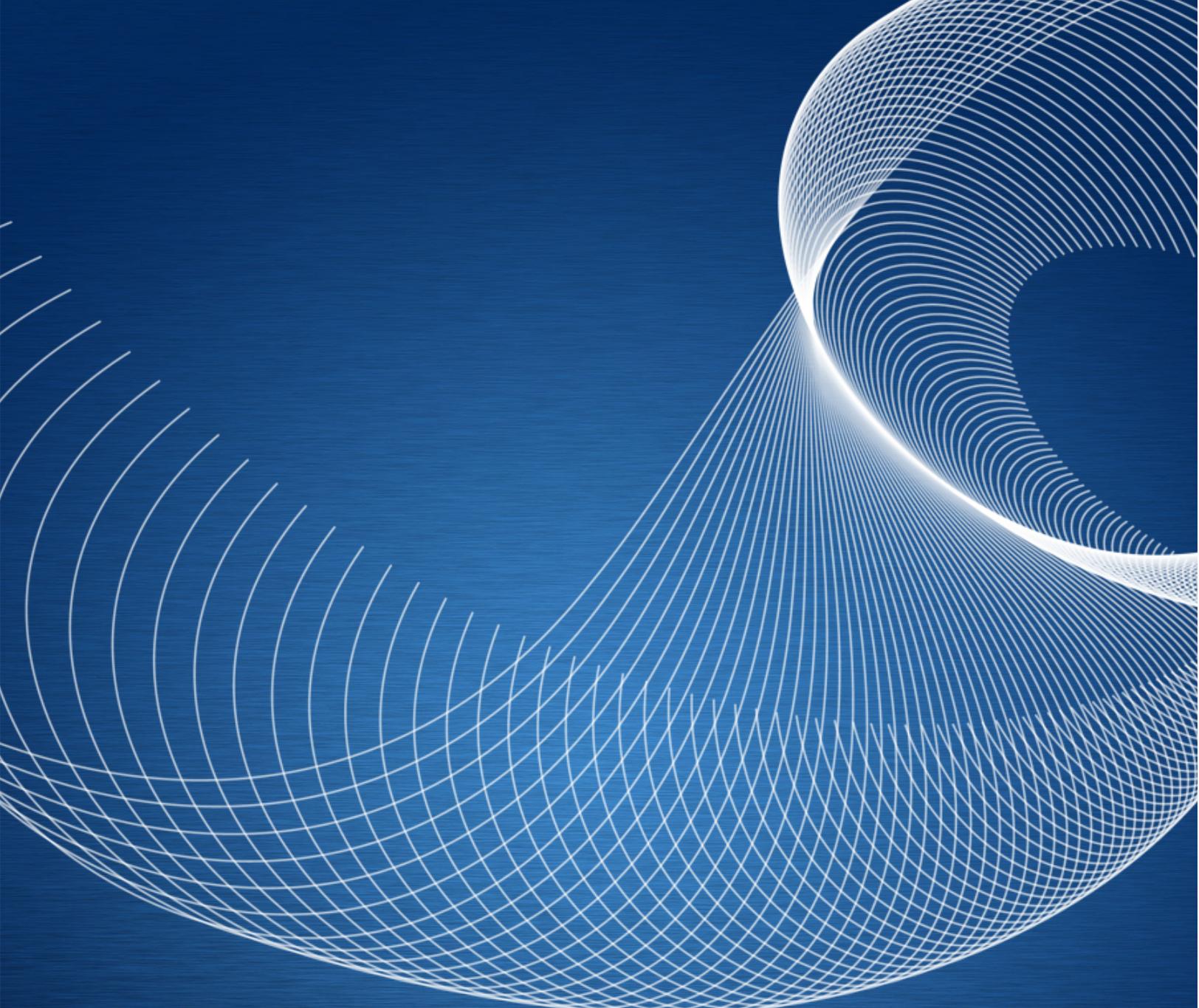
3) Another employee breaks a leg and cannot drive for 3 months. His company allows him to telecommute from home during the recuperation, with the understanding that the telecommunicating would end after 3 months. This is an out-of-scope flexible workplace arrangement because of the specified three month limitation.

Note: Arrangements that are expected to continue indefinitely are usually in scope; those set up for a special project are out of scope."

- 7 Survey on Workplace Flexibility, WorldatWork, February 2011.
- 8 Where People Worked, 2003 to 2007, US DOL BLS, Issues in Labor Statistics, June 2009. Based on a special tabulation of American Time Use Survey data.

- 9 Work at Home Summary, BLS Economic News Release USDL 05-1768, 2005.
- 10 Telework 2011—A WorldatWork Special Report
- 11 Where People Worked, 2003 to 2007, US DOL BLS, Issues in Labor Statistics, June 2009. Based on a special tabulation of American Time Use Survey data.
- 12 BLS 2010 ATUS Economic News Release, Table 7.
- 13 WorldatWork Telework Trendlines 2009, data from The Dieringer Research Group, Inc. Note: Because this data is for those who self reported as telecommuters only rather than all U.S. adults, the margin of error for telecommuter data is +/- 8.6 percent.
- 14 WorldatWork Telework Trendlines 2009
- 15 WorldatWork, 2011 Survey on Workplace Flexibility
- 16 WorldatWork Telework Trendlines 2009
- 17 Telework Adoption and Energy Use in Building and Transport Sectors in the United States and Japan, Matthews and Williams, Journal of Infrastructure Systems ASCE, 2005.
- 18 Status of Telework in the Federal Government—Report to Congress, US Department of Labor, 2009.
- 19 Teleworking: The Quiet Revolution, Gartner Dataquest, 2005.
- 20 US Telecommuting Forecast, 2009 to 2016, Forrester Research, March 11, 2009.
- 21 100 Best Companies to Work For, Fortune, 2011.
- 22 Calculated by the Telework Research Network's proprietary Telework Savings Calculator™ and assuming: 25% reduction in real estate costs at \$43/sf, 1.5 day a year reduction in absenteeism, 10% reduction in turnover, and 25% increase in productivity (at an average salary of \$41,605, the weighted average of the jobs included in the projection - based on 2009 ACS)
- 23 Calculated by the Telework Research Network's proprietary Telework Savings Calculator and assuming IRS standard mileage reimbursement for auto costs (not including gas), \$3.80/gallon for gas, and food and clothing costs based on BLS data (net of extra home costs for food and net of extra home electricity for home office use).
- 24 Calculated by the Telework Research Network's proprietary Telework Savings Calculator and assuming 75% reduction in telecommuter driving on telework days for those 82% of employees who formerly drove to work solo, oil at \$100/barrel, 20.3 average mpg, US DOT accident metrics, and EPA pollution metrics.
- 25 2006 Status of Telework in the Federal Government - Report to Congress (reporting on 2005)

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The Bottom Line on Telework

California Government Workforce

Prepared for Secure Computing Environment's
2011 Work Anywhere Symposium
Sacramento State University



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INTRODUCTION

State and local government employees are bummed out, burned out, and stressed out from the endless struggle of trying to do more with less. To make matters worse, more than half the state's most experienced people are moving toward the door to retirement. If California expects to attract a new generation of talented government leaders and staff workers it needs to find a new way of working, both figuratively and literally.

This report will show how telework can save government employers up to \$11,000 per part-time telecommuter per year. This new workplace strategy offers a relatively easy, inexpensive, and popular solution to some of government's most vexing problems such as:

- attracting and retaining talent
- reducing traffic congestion
- improving air quality
- reducing energy consumption
- reducing employee stress
- increasing morale

Thanks to advances in technology work no longer needs to be tethered to time or place. *Telework* allows substitution of technology for business travel in general, and *telecommuting* substitutes technology for commuter travel specifically. Thanks to these new ways of working, employers are slowly learning that when employees are not constrained by where and when work is done, they're more productive, more creative, and more successful.

In the 1970s Jack Nilles, a former NASA rocket scientist, turned his attention to solving the problem of traffic congestion and coined the terms *telework* and *telecommuting*. At the time, many predicted we'd soon see an end to the wasteful and inefficient exercise of moving millions of workers back and forth to work each day.

Those predictions, and many since, have failed to materialize. While research shows that about 50 percent of state and local government jobs are telework-compatible, only 5.3 percent of state workers and 2.5 percent of local workers consider home their primary place of work.^{1,2}

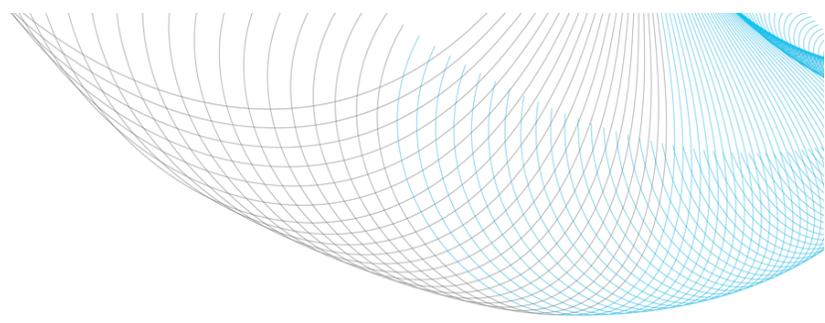
Thousands of organizations and millions of employees in a wide range of public and private sector jobs have already successfully adopted a wherever, whenever approach to work. They're proof that the biggest barrier to telecommuting—management mistrust—can and should be overcome because the bottom-line benefits are worth the effort. And those same organizations have perfected and made available “best practices” that use a combination of technological and cultural solutions to address the security, communications, collaboration, managerial, and social aspects of remote work.

Those leaders have shown that by offering workplace flexibility and measuring performance based on results rather than presence, they really can do more with less: less buildings, less pollution, less overtime, and less waste. And their employees can do more with less too—less stress, less distractions, and less driving.

While worries over weather calamities, earthquakes, the spread of disease, terrorism, rising fuel prices, transit strikes, and road closures often spike an interest in remote work, less transient issues are now driving more widespread adoption.

Talent shortages, changing workforce dynamics, and employee burnout—key drivers of workplace flexibility before the recession—are returning with a vengeance. Research by Gallup shows that 70 percent of the workforce is not engaged. As much as 20 percent are either wandering around in a fog, or actively undermining their co-workers' success.

The majority of Baby Boomers are at or near the highest rung of the career ladder they're likely to achieve. The raises, promotions, and accolades that once motivated them have been replaced with



thoughts of retirement, aging parents, mortality, and “what do I really want out of life?” AARP research shows that 70 percent want to continue to work, but they want to do it on their terms. Even now, many are eyeing self-employment as an option.

Gen X, the first latchkey kids, watched their workaholic parents climb the career ladder. They’re independent souls because they had to be. They learned the reality of employer loyalty from seeing their parents struggle through the layoffs of the early ‘80s—a lesson that’s been reinforced in recent years. They grew up with technology and they value freedom; and they want to do things their way.

Gen Y grew up questioning their parents; now they’re questioning their employers. They’re confident, tech-savvy, happy to communicate virtually and eager to be part of a team, but they’re not in it for the gold watch.

The message is clear. This is not your father’s workforce.

Telework isn’t ‘just’ an HR, IT, corporate real estate, or sustainability tactic. It’s much more. Best practices show that in order to maximize its potential, workplace flexibility needs to be part of an organization’s culture. It needs to be endorsed at the highest levels, supported by middle management, coordinated across functional areas, and integrated into everyone’s goals.

Winning employers have already taken steps to make work flexible; to manage their salaried, hourly and contingent workforce by what they do, not where, when or how they do it; and they’ve adopted the tools and technologies that make flexible work possible.

California is home to some of the worst traffic, natural disaster, sustainability, and budget challenges in the country. Telework offers a solution.

ABOUT THIS REPORT

While there are benefits associated with all forms of workplace flexibility, the focus of this paper is on regular home-based telecommuting. There are three reasons for this. First, home-based telecommuting is the only form about which government data is available. Second, while working in coffee shops, at telework centers, or other places is popular, home is by far the most common non-traditional workplace. And third, regular part-time telework offers the greatest benefits for all constituents and few of the drawbacks.

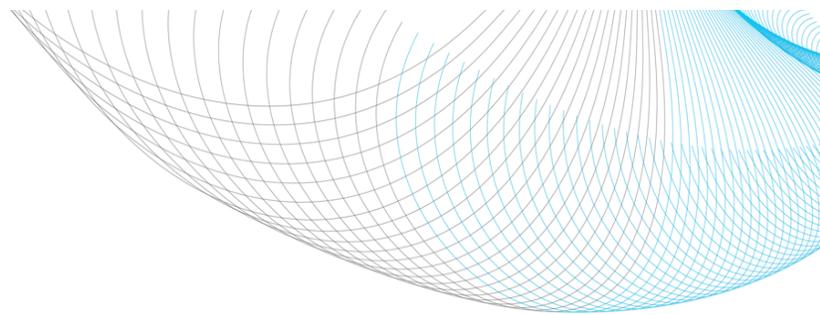
This paper is organized into three sections that summarize the qualitative and quantitative benefits of telecommuting for:

- Government agencies
- Employees, and
- the Community at large

The quantitative conclusions in this paper are based on a Telework Savings Calculator™ built by the [Telework Research Network](#), a consulting and research organization that specializes in evaluating the bottom-line impact of workplace flexibility for companies and communities.

Using the latest government data and assumptions culled from a synthesis of over 500 case studies, scholarly reviews, research papers, books, and other documents on telecommuting and related topics, the Telework Research Network has analyzed the economic, environmental, and societal potential of telecommuting for the US, the UK, and Canada. Their unique research has been cited in the *Wall Street Journal*, *Harvard Business Review*, *Inc.* magazine, and [scores of other publications](#).

Throughout this report, every attempt has been made to err on the side of cautious assumptions, rather than aggressive ones. Data was collected from the most respected sources and industry ex-



perts. Where possible, multiple sources were consulted to corroborate the assumptions.

The primary sources of data used in the development of the California Public Workforce Telework Savings Calculator™ include:

- American Community Survey / Census
- Bureau of Labor Statistics
- California Air Resources Board
- Booz Allen / GSA Telework Study
- US Bureau of Transportation Statistics
- US Environmental Protection Agency
- National Highway Safety Administration
- WorldatWork
- Reason Foundation
- California Telework Advisory Group

Telework Savings Calculator: General Assumptions

The following general assumptions provide the basis for the analysis that follows:

- ▶ Telecommuting frequency: average of 2 days per week ³
- ▶ Employees who want to telecommute: 79 percent ⁴
- ▶ Jobs compatible with telework: 51 percent of state government employees, 48 percent of local government employees ⁵



EMPLOYER BENEFITS

The primary financial benefits of telework for employers come from reduced real estate costs, increased productivity, and reduced absenteeism and turnover.

REAL ESTATE IMPACT

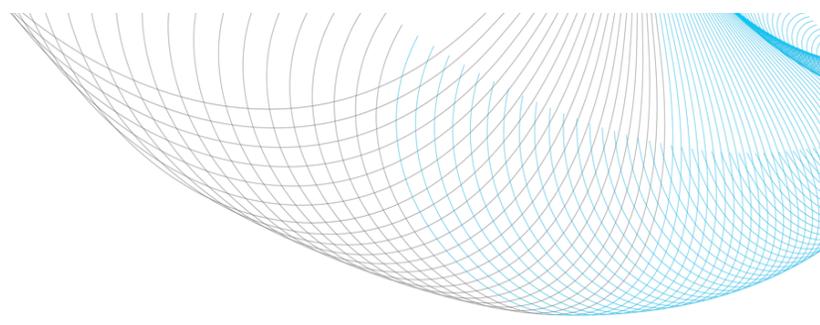
Traditional offices are expensive, inefficient, inflexible, and difficult to scale (particularly down). Telework programs can not only reduce the capital drain of owning or leasing a building, they can save on electricity, transit subsidies, parking lot leases, furniture, supplies, maintenance, security, janitorial, insurance, taxes, common area expenses, and other related costs.

In addition, telework can reduce the cost of complying with disability, environmental, and office safety regulations. And it can help agencies consolidate inefficient space.

Through desk sharing, office hoteling, and other changes to the office footprint, organizations have found they're able to save money and, at the same time, better address the needs of their workforce.

When asked to assess the lasting impacts of the recession, over sixty percent of respondents to a New Ways of Working (NewWOW.net) survey reported replacing assigned one-to-one workplace seats with alternative workspaces.

Videoconferencing, teleconferencing, remote desktop technologies, virtual training, and other remote collaboration technologies are changing the nature of work. The most progressive organizations are designing their workplaces to increase efficiency, and promote teamwork. For them, the traditional office is where people go to collaborate, and employees' home offices are where people go to concentrate and get things done.



“Walking around the offices at Sun Microsystems and seeing 70% of the desks and offices empty is what sold me on telework.”

- Scott McNealy, former CEO, Sun Microsystems

Industry Research on Real Estate Savings

- The US Patent & Trademark Office avoided \$11 million in new real estate expenses through telework and office hoteling. Over 80 percent of eligible staff telework telecommute.
- The Defense Contract Management Agency, plans to shed all but 1,000 of its almost 13,000 desktop computers over the next three years, for an estimated savings of \$5 million by 2014.
- Sun Microsystems reported saving \$68 million a year in real estate costs, \$3 million a year in reduced power consumption, and \$25 million a year in IT expenditures with flexible work options for 17,000 employees.
- McKesson Corporation’s telework program saves \$1 million a year in real estate costs.
- At Oracle BV, redesigned workspaces, hot-desking, and electronic access to documents improved interaction between staff and reduced space usage from 247 sq. ft. per employee to 140 sq. ft..
- Microsoft was able to accommodate 30 percent more people in the same amount of space through flexible workplace strategies.
- Hewlett Packard, through a combination of mobile work initiatives and space reconfiguration, has been able to drive office space utilization from 35 percent—not atypical in modern offices—to over 75 percent in just 3 years. They’re desk-sharing ratios range from between 2 to 1 and 20 to 1.
- DEGW, a worldwide workplace strategy consulting firm, reports that based on a survey of over 60,000 North American employees and their observations of thousands of workers, the average knowledge worker spends only about 35 percent of the time at their desk.

Telework Savings Calculator: Real Estate Assumptions

- ▶ Average office cost: \$6,803 per employee based on CA Telework Advisory Group data
- ▶ Real estate reduction: 20 percent for two-day-a-week telework based on U.S. GSA model
- ▶ Electricity savings: none assumed (extra home office energy usage is, however, shown as an offset to Employee Savings covered later in this paper)

The Bottom Line on Real Estate:

\$1,360 in annual savings per 2 day a week teleworker

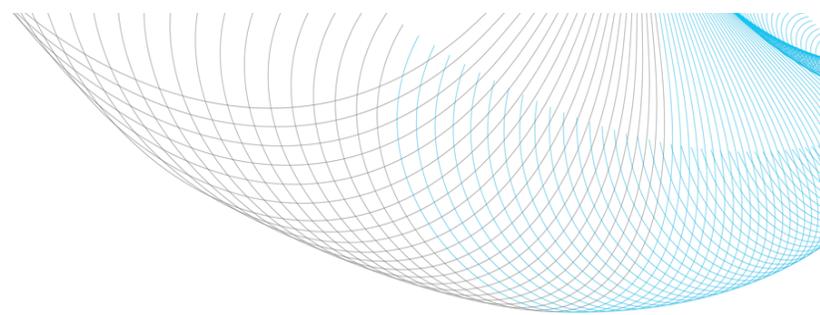
Government-wide savings: \$563 million a year

PRODUCTIVITY IMPACT

Lack of management buy-in is the most commonly cited obstacle to the adoption of telecommuting programs. It’s clear that the majority of managers feel that left unmonitored, employees will not work as hard as they otherwise would. The facts show just the opposite to be true.

Study after study reveals that people who work from home are more productive than their office counterparts. Contributing factors include:

- Fewer interruptions: Home-based workers are not distracted by the many time drains that take place in a traditional office: morning chatter, coffee breaks, long lunches, rumor mills, birthday parties, football pools, etc.
- More effective time management: E-mail and other asynchronous communications can be time-managed more effectively and are less apt to include non-work digressions.



- Feeling like a trusted employee: A sense of empowerment and commitment has consistently shown to be one of the highest contributors to employee job satisfaction.
- Flexible hours: For those who are able to flex their hours as well as their location, telecommuting allows them to work when they are most productive.
- Longer hours: Many employees work during the time they would have otherwise spent commuting. In fact, overworking is a significant problem.

Industry Research on Productivity

- A study of the return on investment from telework prepared by management consulting firm Booz Allen for the US General Services Administration estimated increased productivity among teleworkers at one hour per day.
- In a 2008 global survey of nearly 2,000 employees, Cisco Systems estimated they could achieve an annual increase in productivity of \$277 million through telework. They found:
 - their teleworkers spend 60 percent of time they would have otherwise spent commuting doing work
 - 69 percent of employees cited higher productivity when working remotely
 - 75 percent of telecommuters felt their ability to meet deadlines improved
 - 83 percent said their ability to collaborate and communicate with co-workers was the same as or better than being on-site
- A Basex survey of over 1,000 information workers concluded that workplace interruptions comprise 25 percent of their workday.
- A 2010 survey by TELUS Communications found that 56 percent of respondents thought the option to work flexibly would motivate them to work harder.
- Alpine Access, one of the largest all-virtual employers, attributes a 30 percent increase in

sales and 90 percent reduction in customer complaints to its home-based agents.

- Sun Microsystems (now part of Oracle), found that teleworkers spend 60 percent of the commuting time they saved performing work for the company.
- In an IBM study of more than 24,000 global managers, 80 percent agreed that productivity increases in a flexible environment.
- A Work+Life Fit / BDO Seidman survey of CFOs showed that 75 percent felt that flexible work increases productivity.
- Best Buy measured an average productivity increase of 35 percent through its flexible work program.

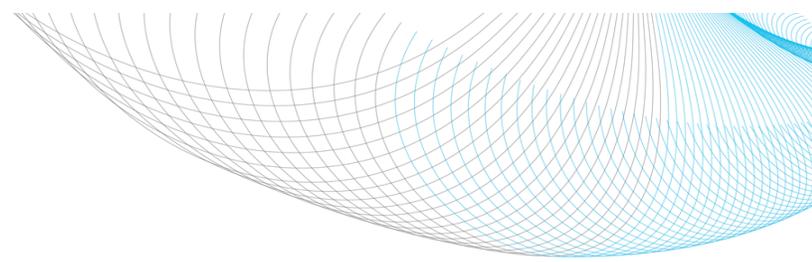
Telework Savings Calculator: Productivity Assumptions

- ▶ Productivity increase: 15 percent on telework days based Booz Allen / U.S. GSA report
- ▶ Average salary: \$76,862 for state government employees, \$77,442 for local government employees based on American Community Survey data for telework-compatible jobs
- ▶ Employee benefits overhead: 34.5 percent based on BLS Data

The Bottom Line on Productivity:

\$6,200 annual increase per 2 day a week teleworker

Government-wide savings: \$2.6 billion a year



ABSENTEEISM IMPACT

Unscheduled absences cost employers billions. They necessitate staffing redundancies, increase overtime costs, inconvenience coworkers and customers, impact morale, and reduce productivity.

Telecommuters are absent less often because they:

- Are less exposed to sick co-workers
- Are exposed to fewer occupational and environmental hazards
- Avoid driving—something OSHA considers to be the most dangerous part of an employee's day
- Continue to work when they're sick
- Return to work more quickly following pregnancy, surgery, or extended illnesses
- Are able to handle personal appointments without taking a full day off
- Have more time for exercise
- Eat better

Perhaps the most important reason they're absent less is that they are more satisfied with their job and therefore less likely to fabricate an illness.

According to the Conference Board of Canada, a global independent not-for-profit organization focused on helping businesses strengthen their performance and better serve society, absenteeism is at the highest level it's been in the 20 years they've been tracking it. Recession-related stress is likely the blame.

According to Towers Watson, a leading global professional services company, the link between healthy and productivity goes beyond the physical and mental health of individuals to creating a healthy work environment. They find that organizations with the most effective health and productivity programs experience:

- 11 percent higher revenue per employee

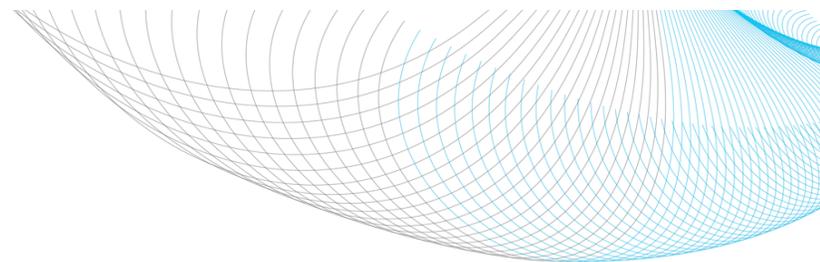
- Lower medical trends by 1.2 percentage points
- 28 percent higher shareholder returns

Towers Watson also found that excessive work hours (75 percent), lack of work/life balance (65 percent), and fears about job loss (64 percent) are the foremost sources of stress affecting organizations today.

The opposite of absenteeism, presenteeism is costly for organizations too. The people who drag themselves to the office only to make everyone else sick aren't doing anyone any favors. Studies show that the large majority of people go to work when they're sick because the company culture, benefits, or policies—perhaps unwittingly—encourage it.

Industry Research on Absenteeism

- Sick leave among state and local government employees is almost 70 percent higher than that of the private sector
- 78 percent of employees who call in sick, really aren't. They do so because of family issues, personal needs, and stress
- The US federal government's telework cost/benefit model estimates a 63 percent reduction in unscheduled absences per teleworker
- The federal government's telework program was originally put in place to avoid the spread of contagious disease
- Telework has proven to be the second most effective method of reducing absences; flexible scheduling is first
- Among those companies that have tried to reduce work-life conflict, 84 percent say it's had a positive impact
- A Wake Forest University study of over 3,000 employees showed that those with flexible schedules were less likely to have health problems that affect their job performance
- Companies with the most effective health and productivity programs have 1.8 fewer days absent per employee



"Until cable companies starts giving precise appointments (not 9am to 1pm), we will always have people sitting at home waiting on them. The choice is ours, we can have them productive on work or watching TV."

- John Sawislak, Senior Fellow at the Telework Exchange

Telework Savings Calculator: Absenteeism Assumptions

- ▶ Current absenteeism rate: 2.5 percent based on BLS data
- ▶ Annual cost per unscheduled absence per person: based on average daily compensation for local and state government telework-compatible jobs (American Community Survey)
- ▶ Average reduction in absenteeism: 4 days a year based on Booz Allen / GSA model

The Bottom Line on Absenteeism:

\$1,790 per telecommuter per year

Government-wide savings: \$740.7 million a year

ATTRACTION AND RETENTION IMPACT

The majority of state employees who hold managerial or higher positions will be eligible to retire in the next five years. Among them:

- 62 percent of Career Executives / Exempts
- 50 percent of Managers / Supervisors
- 35 percent of Rank and File

Retaining senior government talent is crucial to the knowledge transfer process.

The cost of replacing an employee extends far beyond the recruiting process; it includes separation

costs, temporary replacement costs, training costs, and lost productivity. An employee's exit can also lead to a loss of business, coworkers, and organizational memory. Telecommuting enhances attraction and retention because it:

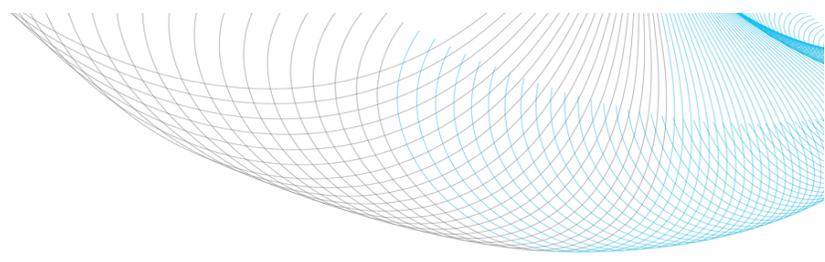
- Is among the top non-financial benefits desired by employees
- Expands the talent pool beyond geographic boundaries
- Provides access to disabled, rural, and other difficult to reach workers
- Offers alternatives that would have otherwise kept retirees, parents and senior caregivers out of the full-time workforce

Prior to the recession, being able to hire and retain good people was one of management's top non-financial concerns. As the recovery continues, retention and hiring problems will be exacerbated.

In a 2007 report, Deloitte predicted that the government sector would be particularly hard hit by talent shortages in the years ahead. "To become a choice employer among this emerging workforce, the public sector must appeal to a population insistent upon a sociable, flexible, purposeful, and technologically savvy work environment. Certain perceptions of government work, if not reversed, pose a major obstacle to attracting Gen Y into government. The image of the public sector as a slow-moving, bureaucratic monolith, juxtaposed against a fast-moving, anti-bureaucratic Gen Y, poses a significant challenge."

"In a bad economy, we can hire and retain good employees with little effort, but as the economy improves (and it always does), the first sign will be when we lose our good people. Flexible work rules allow us to keep our best people happy even as the competition for their services increases."

- John Sawislak, Senior Fellow at the Telework Exchange



Industry Research on Attraction and Retention

- Research by WorldatWork shows that 79 percent of employees say they would like to work from home, at least part of the time.
- In a 2011 survey of over 2,000 adults conducted by Mom Corps, more than 40 percent said they would take a pay cut in exchange for the opportunity to work from home.
- A study conducted by Deloitte at the peak of the recession found that nearly half of employees were either looking for a new job or planning to do so when the economy improved.
- In a Cisco survey of 2,600 worldwide employees, two out of three said they would take a job with less pay and more flexibility over a higher-paying job without it. Ninety-one percent of respondents said telecommuting was somewhat or very important to their overall job satisfaction.
- A WorldatWork survey found that 85 percent of employers say telework has a moderate to high impact on employee retention.
- Turnover among VIPDesk's home-based customer agents is less than 10 percent; compared to 100–150 percent typical in a traditionally staffed call center.
- Over two-thirds of Schering-Plough Corporation's telework program participants say that being able to telework has been a factor in their decision to stay with the company.
- In a Robert Half / Career Builder survey, 72 percent of employees said flexible work arrangements would cause them to choose one job over another; 37 percent specifically cited teleworking.
- That same Robert Half / Career Builder survey found over half of managers felt that Gen Y workers are more difficult to recruit and to retain but noted that they are particularly attracted to flexible work arrangements (ranked as 8 on a 10 scale for impact on overall job satisfaction).
- An AARP study found that 70 percent of Baby Boomers plan to work for pay after retirement by seeking flexible work arrangements and part-time

schedules that allow them to pursue other interests.

- A Cornell University reported that 71 percent of retired workers who later decided to go back to work originally retired because of a desire for more flexibility than their job offered.
- BLS data shows that 5.4 million Americans with at least some college education aren't working.
- More than 12 percent of the working age population is disabled. Accessible-Society.org reports that a full three quarters of those who are unemployed cite discrimination in the workplace and lack of transportation as the major factors that prevent them from working.
- In a nationwide survey, CDW found that forty-one percent of workers who have the option to telework are "very satisfied" with their jobs, compared to only 27 percent of those who are office-bound.
- WorldatWork and other workforce experts estimate that turnover costs and employer 75 percent of an hourly person's pay, and between 150 – 200 percent of an salaried person's pay.

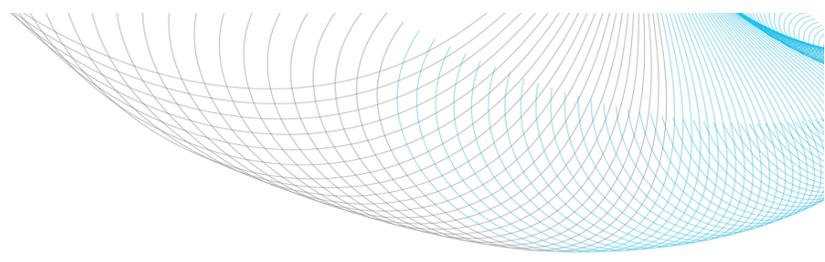
Telework Savings Calculator: Retention Assumptions

- ▶ Reduction in attrition: 15 percent based on a synthesis of a wide range of studies
- ▶ Existing voluntary turnover: 9.2 percent based on BLS data for state and local government jobs
- ▶ Cost of turnover: 138 percent of salary based on mid-point of WorldatWork estimates

The Bottom Line on Retention:

\$1,980 annual savings per 2 day a week teleworker

Government-wide savings: \$819 million a year



OTHER EMPLOYER BENEFITS

Employer benefits that have not been quantified in this report include:

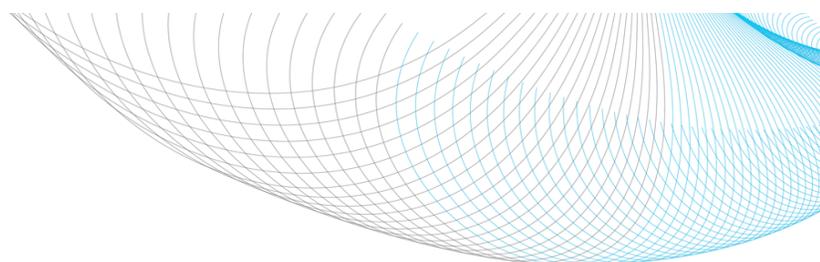
- Improved continuity of operations
- Reduced transit subsidies
- Avoidance of environmental sanctions
- Higher community citizenship scores for being environmentally and labor friendly
- Reduced overtime
- Improved customer service
- Reduced paper, travel, and technology costs
- Reduced ADA compliance costs
- Reduced need for overstaffing to accommodate peak loads
- More effective and less expensive 24/7 global coverage
- Avoidance of local labor burnout
- Ability to hire people without brick and mortar presence
- Reduced healthcare costs
- Reduced vehicle fleet

The Bottom Line
State and Local
Government
Annual Savings:

\$11,365 per 2-day-a-week teleworker

Government-wide: \$4.7 billion/year





EMPLOYEE BENEFITS

Employers aren't the only ones who benefit from telework. For employees, it saves them two of their most precious commodities, time and money.

A CDW study found the top reasons federal employees want to work from home are:

- Reduced commute (63 percent)
- Greater flexibility (49 percent)
- Greater productivity (29 percent)
- Saving money (28 percent)

EMPLOYEE FINANCIAL SAVINGS

In a Business Week survey conducted during the 2008 run up in fuel prices, 92 percent of employees said they were concerned with the high cost of fuel. Eighty percent of them specifically cited the cost of commuting to work. Seventy-three percent felt their employers should take the lead in helping them reduce their commuting costs. In the same survey, two-thirds said they'd take another job to ease the commute. At the time, fuel was more than a dollar a gallon cheaper than it is today.

Beyond the cost of gas, telecommuters save on vehicle wear and tear, parking, transit costs, food, clothing, and more.

Telework Savings Calculator: Employee Cost Savings Assumptions

- ▶ Gas cost: \$3.80 per gallon
- ▶ Gas usage based on EPA standards
- ▶ Parking costs: based on Colliers Parking Survey (high, mid, low)
- ▶ Food (net of food at home): based on BLS data (high, mid, low)
- ▶ Clothing: based on BLS data (high, mid, low)

- ▶ Distance to work: 32 miles round-trip based on Air Quality Management District data
- ▶ Workweeks per year: 46.6 based on California Telework Advisory Group data
- ▶ Auto costs (net of gas): based on IRS data
- ▶ Reduction in driving on telework days: 75% per Air Quality Management District data
- ▶ Breakdown of means of transportation to work (solo drivers, car/vanpoolers, public transit users, bikers, walkers, other): American Community Survey, California government worker data
- ▶ Cost of extra home office electricity (as a reduction in employee savings): based on data from the Global Environment and Technology Foundation

Employee Time Savings

In terms of time, twice weekly telework can save between 1 and 3 workweeks a year—time they'd have otherwise spent commuting.

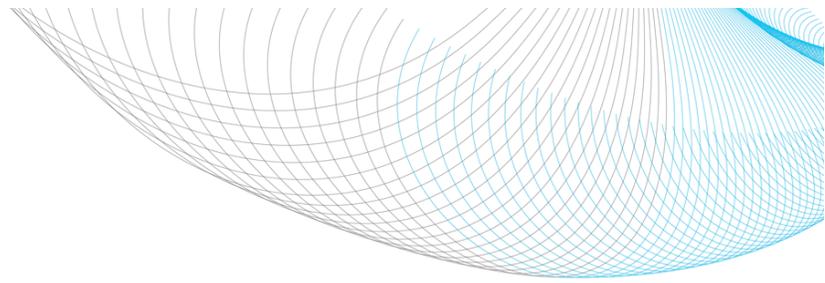
And the commute is likely to get worse. According to the Reason Foundation, if traffic continues to grow at the current pace over the next couple of decades, drivers in many of the nation's cities will be sitting in daily traffic jams worse than those that currently plague Los Angeles 8 hours a day. Their commutes will take almost twice as long.

Telework Savings Calculator: Employee Time Savings Assumptions

- ▶ Mean round-trip commute: 54 minutes based on American Community Survey data for California
- ▶ Equivalent days calculation based on 8-hour days

OTHER EMPLOYEE BENEFITS

Beyond the employee savings we've quantified in this paper, many employees can save on:



- Daycare/eldercare—particularly for those who are able to adjust their hours around those needs
- Serendipity purchases
- Office gifts and kitties
- Vehicle insurance
- Healthcare costs
- Other office-related incidentals

In addition, some may qualify for home office deductions. And some may even be able to relocate to less expensive communities or avoid selling their real estate at distressed values in order to take a job in a new community.

The Bottom Line on Employee Savings:

\$1,850 to \$4,500 in annual savings per 2 day a week teleworker per year

8 workdays a year in time they'd have otherwise spent commuting

Workforce-wide savings: \$1.1 billion (based on mid-level savings)

COMMUNITY BENEFITS

In his book, *A Thousand Barrels a Second: The Coming Oil Break Point and the Challenges Facing an Energy Dependent World* (McGraw-Hill 2007), Peter Tertzakian, Chief Energy Economist & Managing Director at ARC Financial Corporation writes: “Right now, the only thing anyone cares about is the rising price of energy; but soon we’ll be worried about potential changes to our lifestyles, the trade-off between cheap energy and clean energy, the necessity of building new refineries and power plants in our backyards, an even the impact on nation secu-

rity. Our birthright of abundant, reliable energy is coming to an end.”

“Expanding performance-based telework will save taxpayer money, ease traffic congestion, save energy, and help us clean our air,” says Auburn City Council member, Kevin Hanley. “Implementing a smart telework policy is indispensable in getting California on the comeback trail.”

Telecommuting can reduce our energy usage, greenhouse gases, and traffic congestion and provide a significant savings to society.

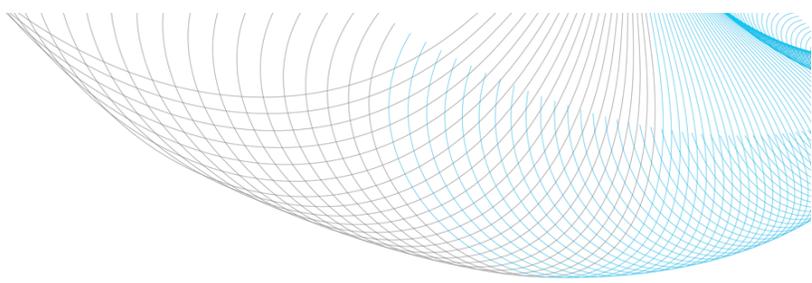
Telework Savings Calculator: Energy, Greenhouse Gas (GHG), and Air Quality Improvement Assumptions

- ▶ Gas savings: as described in the Employee Benefits section
- ▶ Trip reduction: based on Air Quality Management District data applied to breakdown of CA government employee means of transportation to work (per American Community Survey)
- ▶ Imported oil cost = \$100/barrel
- ▶ GHG calculations based on EPA standards
- ▶ Air Quality improvements based on California Air Quality Board standards applied to breakdown of CA government employee means of transportation to work (per American Community Survey)
- ▶ Note: U.S. GHG reduction stated in million metric tons (MMT)

TRAFFIC & ACCIDENT IMPACT

According to TrafficSafety.org, traffic accidents cost the nation \$60 billion a year and result in 3 million lost workdays. More than a quarter of accidents occur during the commute to and from work, making it the most dangerous part of an employee’s day.

Traffic congestion stresses drivers and reduces their productivity by forcing them to leave more time for



travel rather than risk being late. It reduces the reliability of transport, which can impact an organization's inbound and outbound shipments. It makes employers located in high traffic areas less attractive to employees. It increases idling, which contributes disproportionately to pollution. And it increases highway maintenance costs.

At the extreme, traffic congestion can even cause businesses to opt for more commuter-friendly locations—a substantial cost to the losing economy.

With traffic congestion comes accidents, the cost of which doesn't stop at the repair shop. Other costs to both consumers and the economy include property damage, hospital and emergency care, police, fire, ambulance, tow trucks, out of pocket costs, and increased insurance premiums.

Fortunately, lowering traffic volume has a multiplicative impact on congestion. According to a study by Confederation of British Industry, a mere five percent decline in traffic volume can cut time lost in congestion by as much as 50 percent.

Telework Savings Calculator: Traffic and Accident Assumptions

- Accident incidence and costs: based on Department of Transportation and Federal Highway Administration Standards

OTHER COMMUNITY BENEFITS

Beyond the community benefits quantified in this report, widespread telecommuting could:

- Increase the life of infrastructure including roads and transit
- Improve emergency responsiveness
- Reduce road rage
- Reduce overcrowding
- Revitalize cities by reducing traffic
- Increase productivity by reducing travel times

- Provide portable work options for military families
- Reduce the offshoring of jobs and “homeshore” some that have already been lost
- Raise the standard of living in rural and disadvantaged areas
- Help bedroom communities retain the commerce that would otherwise be lost to employer communities
- Reduce terrorism targets of opportunity
- Provide employees access to jobs that would allow them to maximize their potential
- Promote inbound talent migration without adding to local population
- Further reduce travel through widespread use of virtual technologies
- Increase workforce mobility.

Annual Bottom Line on Community Savings:

\$73 million in accident related costs

1.8 million barrels of oil valued at \$181 million

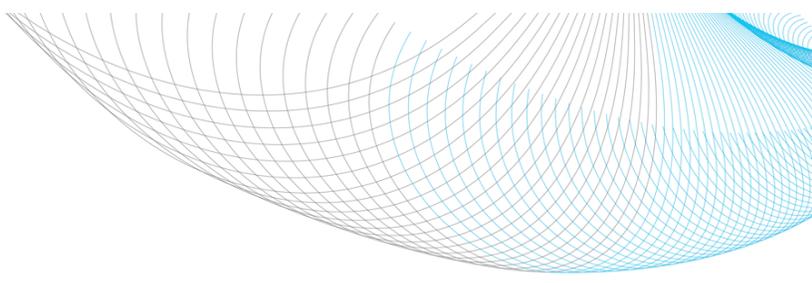
718 million vehicle miles not traveled

53 million fewer trips

330,000 tons of greenhouse gases (equivalent to 60,000 cars)

3,870 tons of air pollutants a year

\$253 million in total community savings



THE BOTTOM LINE

The bottom line on employer savings from 2 day a week telework by those state and local government employees with compatible jobs would total over \$4.7 billion a year (see Table 1).

The employee teleworkers would collectively save another \$1.1 billion a year.

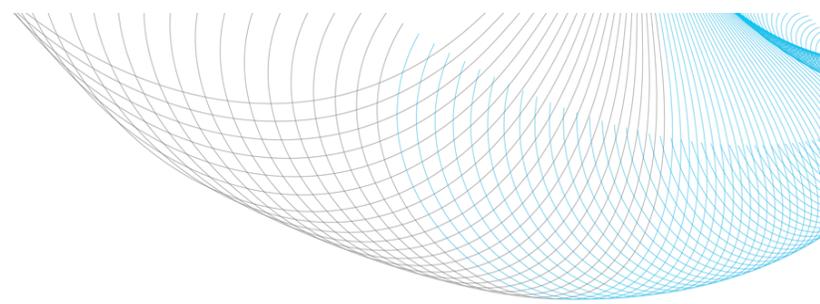
All that together with the savings from traffic accidents and oil imports, would total over \$6 billion a year.

The greenhouse gas impact would equate to taking over 40 percent of Sacramento's solo commuters off the road.



Table 1: CA Government Telework Potential Annual Impact

Employers	State	Local
Real Estate	\$168 M	\$395 M
Productivity	\$765 M	\$1.8 B
Absenteeism	\$219 M	\$521 M
Turnover	\$243 M	\$576 M
Total	\$1.4 B	\$3.3 B
Employees	State	Local
Total	\$340 M	\$800 M
Community	State	Local
Oil Imports	\$48.7 M	\$132 M
GHG (MMT)	89,000	241,000
Pollutants (tons)	1,046	2,820
Trips	14.4 M	38 M
Traffic Accidents	\$19.6 M	\$53 M
Total	\$68.3 M	\$185 M
Total Impact	\$1.8 Billion	\$4.3 Billion



SUMMARY

Telework offers a relatively simple, high return-on-investment solution to some of the state's most critical problems:

- Workforce planners see telecommuting as a way to mitigate the “brain drain” effect of retiring Baby Boomers.
- Human resource professionals see it as a way to recruit and retain the best people.
- Work-life experts encourage it as a way to address the needs of families, parents, and senior caregivers.
- Employees desire it because it saves time and money, and improves the quality of their lives.
- Baby Boomers see telework as a flexible alternative to full retirement.
- Millennial workers appreciate it as a way to work on their own terms.
- Disabled workers, rural residents, and military families find it an answer to their special needs.
- Environmentalists applaud it because telecommuting can significantly reduce greenhouse gases and energy usage.
- Financial managers endorse it for its cost savings and increased productivity potential.
- Urban planners see it as a strategy to fill the growing gap between transportation system demand and supply.
- Governments see it as a way to reduce highway wear and tear and alleviate the strain on the nation's transportation infrastructure.
- Organizations rely on it to ensure continuity of operations in case of a disaster or pandemic.

FROM THE EXPERTS

“Other than a stapler and paper clip, hardly anything about the way work gets done in today's offices is the same as it was ten, twenty or even fifty years ago – except for the office itself,” says telework expert Gil Gordon. “The computing and telecommunications revolution we all now take for granted has taken place in offices that are largely unchanged from a century ago. The lighting is better now and the furniture is more comfortable, but most organizations are still bringing all the office workers to the office most if not all of the time. How archaic! It's time to finally rethink the “where” of office work just as we have done with the “how” of office work. Today's government and private-sector office work in so many organizations is running like a sports car with the parking brake on: all that horsepower can't produce the results needed with the drag of the same time-same place office mentality.”

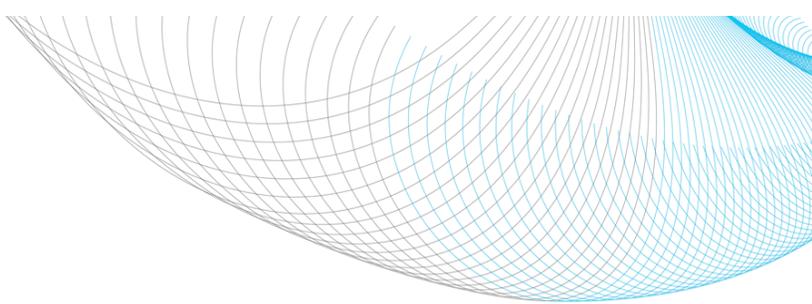
- Gil Gordon, Gil Gordon Associates

“Whether employers want to admit it or not, the nature of work has already changed and the genie is not going back in the bottle. If employers expect to compete in the years ahead, they need to see work as verb, rather than a noun.”

- Michael Dziak, COO, e-Work.com

“Time and time again leading organizations have demonstrated that telework is an effective operating model that drives direct improvements in employee efficiency and helps slash operational costs. State and Federal Agencies are being asked to achieve these same outcomes but are forced to use a 19th century operating model. The result is far too often reliance on cost saving measures that have significant side effects and negative consequences (furlough days, employee layoffs, and abandoning critical programs). Telework can deliver immediate results for the State, for employees, and for the environment, without the morning-after headache.”

- Ian Gover, President & CEO, Better Workplace



"The savings are real, the business model for telework is proven. My company alone realized over a billion dollars in savings. It's important to note that it is not an all or nothing proposition. You may have some workers who only telework one day a month, others a couple times a week; the important thing is to find the right balance for each individual and the needs of the organization. At Sun, we found that morale and retention were higher with telework users and that we had higher productivity from them. The dirty little secret is that they worked more productive hours and were happier and it was less expensive to support them."

- Scott McNealy, co-founder and former CEO of Sun Microsystems

"We've repeatedly proven that it is possible, even desirable to have successful organizations whose employees are scattered around the countryside. Technology isn't the problem (if it ever was). So why do we still stick to the old ways? Because many of us are still not sure how to get from that traditional, tense, irritable and frustrated state to a new relaxed, pleasant and self-fulfilled existence. Change is scary. So here we are, still making dumb trips."

- Jack Nilles, president of JALA International (quote from the foreword to *Undress For Success—the Naked Truth About Making Monday at Home*.)

"...here's a deceptively simple action item to put on your agenda for business growth, working families and a green future: Make it the norm for everyone to work at home at least one day a week. That single step could raise productivity, save energy, decrease pollution, reduce traffic congestion, cut household expenses, increase quality of family life, and keep educated women in the workforce."

- Roseabeth Moss Kanter, Ernest L. Arbuckle Professor, Harvard Business School

"In a knowledge worker economy, we need to focus on outcome measures of productivity, not attendance or even output."

- John Sawislak, Senior Fellow at the Telework Exchange

"If you pick the right people and give them the opportunity to spread their wings—and put compensation as a carrier behind it—you almost don't have to manage them."

- Jack Welch, former CEO of GE

"Even though we propose results-based management as an innovation of the last decade or so, it seems to me that results have always been the bottom line. Somewhere along the way we started talking about time—desk-time, face-time, full-time, over-time, as the measurement of what we accomplish and where we accomplish it."

"I am a proponent of flexible and effective workplaces because I believe excellence in management stems from trusting and empowering each person within an organization to do their job to the best of their ability."

- Patricia Kempthorne, Founder/Executive Director, Twiga Foundation, Inc.

"Management by walking around is fine for crumbly organizations that don't trust their employees, but good companies work with their people to establish goals, they give them the tools they need to meet those goals, and then they get out of their way."

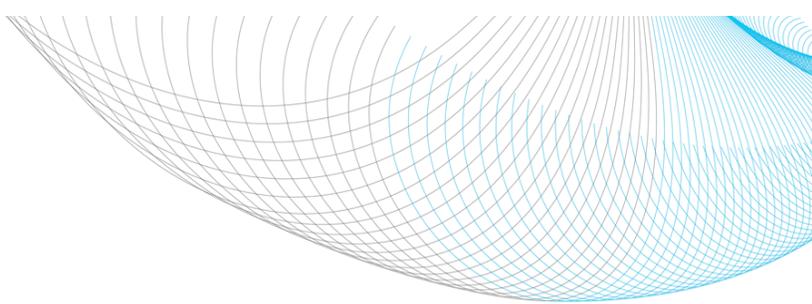
- Jack Nilles, JALA and the father of telecommuting

"Supervisors and team leaders may have difficulty figuring out how to manage employees when they can't see them. That's why a focus on performance outcomes is critical. Detail what is expected of your staff—work products, availability, communication procedures—and hold them accountable wherever they are—at the office, the client's office, the airport, the beach or at home."

- Judy Casey, Director at Work and Family Researchers Network

"Telework forces managers to focus on what's important - efficient and effective work, no matter where it takes place."

- Monica Babine, Senior Associate, Program for Digital Initiatives, Washington State University Extension & College of Liberal Arts



ABOUT THE TELEWORK RESEARCH NETWORK

This report was prepared by Kate Lister and Tom Harnish from the Telework Research Network, a consulting and research firm based in San Diego, California.

The company specializes in evaluating the business case for telework and workplace flexibility. They have synthesized over 500 case studies, research papers, and other documents on the topics. And they've conducted interviews with the largest and smallest virtual employers and their employees, telework advocates and naysayers, top researchers, leaders of successful telework advocacy programs, and venture capitalists who have invested in the remote work model. Their research has been quoted in *he Wall Street Journal*, *Harvard Business Review*, *Inc.* magazine and scores of other publications.

Frustrated by organizational reluctance to initiate workplace flexibility, Lister and Harnish co-authored a popular press book, *Undress For Success—The Naked Truth About Making Money at Home* (Wiley, 2009), to help employees to negotiate, find, or create their own home-based work.

The principals of the Telework Research Network are available for consulting and research projects, custom telework and flexible work modeling for companies and communities, branded web-based telework and flexible work savings calculators, white papers, and public or virtual appearances.

RELATED WHITE PAPERS INCLUDE:

- The State of Telework in the U.S. (April 2011)
- Workshift Canada—The State of Telework in Canada (April 2011)
- The Shifting Nature of Work in the UK—The Bottom Line Benefits (March 2011)

- Results-Based Management—The Key to Unlocking Talent and Increasing Productivity (September 2010)
- Telecommuting: The Bottom Line Impact (US) (May 2010)

For more information visit the [Telework Research Network website](#), or email [Kate Lister](#)

*It's time to make the road less traveled
the way to work.™*

ENDNOTES

¹ U.S. Department of Labor, 2009 Report to Congress shows 61 percent of federal employees hold telework-compatible jobs. The Telework Research Network estimates that based on an agency by agency assessment of jobs, 48 percent of local government and 51 percent of state government jobs in California are telework-compatible. This compares to the overall non-self-employed population compatibility rate of 45 percent for the U.S. total workforce.

² American Community Survey, 2009, CA state workers who worked at home the majority of the time.

³ a) BLS Work at Home Special Report (2004) showed average of 2.4 days a week; b) Working at home: An update, Perspectives on Labor and Income, Statistics Canada, June 2007. In 2005, teleworkers worked at home an average of 17 hours a week. c) chose 2 days a week because at lower frequencies, the opportunity for financial savings are minimal.

⁴ a) WorldatWork.org: 2009 Telework Trendlines shows 79 percent of employees say they would telework if allowed b) 2010 Federal Employee Viewpoint Survey showed only 12.3 percent of employees chose not to telework.

⁵ Telework Research Network estimate based on agency by agency analysis

UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

**2012
Status of Telework
in the
Federal Government**

Report to the Congress

a New Day for Federal Service



UNITED STATES OFFICE OF PERSONNEL MANAGEMENT
JUNE 2012

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Executive Summary

The signing of the Telework Enhancement Act in December 2010 (the Act), set in motion a transformation of Federal telework that will have the effect of unleashing its potential as a strategic intervention for supporting agency effectiveness. The Act provides a framework of requirements designed to ensure a more systematic implementation of telework in Federal agencies than previously existed and adequate notice to employees of their telework eligibility status. Satisfying these requirements has meant a fundamental shift in how agency stakeholders view and implement telework -- from a strictly individual employee benefit to a strategic organizational change *program*.

Program Benefits

Telework program benefits extend from the individual to larger communities. Telework's potential to enhance work-life balance for individual employees is well documented. Implemented widely across agencies, telework has the potential to improve quality of life for communities, for example, by reducing traffic congestion and pollution. Increasingly, however, the potential for agency benefits drives telework implementation.

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

About the Research

The research described was designed to satisfy content outlined in the Act and provides a baseline for evaluation of Federal telework programs under the Telework Enhancement Act of 2010. The study for the report draws upon multiple methods (survey, focus groups, and archival data) and provides a robust picture of telework under the Act through the consequent integration of key stakeholder perspectives (agencies, employees and program managers). As in prior reports, the annual agency Data Call provided the core data for the report. However, to reflect program parameters and measures outlined in the Act, the form of the Call used in 2011 was heavily revised from prior administrations. For this reason, telework program results presented in this report are not directly comparable to findings reported for prior years.

Results provide an overview of agency efforts and status with respect to implementing programs as required in the Act, descriptions of how many and how Federal employees telework, summaries of agency goal-setting efforts, and insights into outcomes related to telework. Agency data are quite informative and provide a detailed picture of current Federal telework activities. Program descriptions are particularly valuable and will provide

opportunities for interagency sharing of best practices. However, caution should be exercised when participation and frequency findings are reviewed. In the absence of a standardized Governmentwide data collection system or trained data collection staff in all agencies, the final combined telework participation estimates are unlikely to be reliable.

Finally, many agencies do not have the current systems capacity to collect all requested data (e.g., situational telework); final participation and frequency numbers may under-report telework activity, again, with consequences for data quality standards, including reliability.

This same systems limitation must be kept in mind when interpreting results. For example, at the time of the Call, some agencies had not yet developed databases to track the number of signed telework agreements. The mismatch between number of agreements and number of teleworkers reflects this limitation in data collection rather than a failure to ensure signed agreements.

Telework Program Implementation

The Act included a number of requirements for Federal telework programs. These are outlined next with results of data collection shown for each.

Findings must be interpreted with respect to the data collection limitations noted above. In addition, some agencies opted to participate in the Data Call although they were not required to do so under the Act. In some instances, apparent non-compliance with the Act results when such agencies elected not to respond to every item.

- *Establish a policy under which eligible employees would be allowed to telework.* All agencies responding to the Data Call (87) had established telework policies; 73 percent of which met the requirements of the Act at the time of the Call. Focus group participants described the time-consuming effort of revising policy, and the lengthy internal review processes that made it difficult or impossible to align telework policies with Act requirements in time to meet the June 2011 deadline.
- *Designate a Telework Managing Officer (TMO).* Practically speaking, all respondent agencies had designated a permanent or acting TMO at the time of the Call. The two that did not were not covered by the Act, and thus not bound to adhere to its requirements.
- *Determine and notify all employees of their eligibility to telework.* All reporting Executive branch agencies governed by Act requirements had notified agency employees of their eligibility to participate in telework. At the time of the Call, a total of 684,589 agency employees had been determined eligible to telework, representing almost 32 percent of the 2,165,390 employee population reported by agencies.
- *Require a written agreement between an agency manager and each of his or her employees authorized to telework.* While not every agency has systems in place to track telework agreements, records maintained by the 82 agencies that were able to provide responses show that a total of 144,851 employees have a telework agreement with their managers. Agencies renew telework agreements periodically, in some cases,

according to a fixed schedule and, in others, whenever an employee’s supervisor or position changes.

- *Ensure that an interactive training program is provided to eligible employees and their managers and that the training is successfully completed by employees prior to entering into a telework agreement* (unless specifically waived by the head of the agency). The web-based training posted on the Office of Personnel Management's (OPM’s) telework website (www.telework.gov) was the most commonly reported source of training.
 - Agencies were asked to report the number of employees and managers who had received telework training since the signing of the Act. Again, data collection methods often did not permit points of contact (POCs) to respond to this question. Reportedly, a total of 166,348 employees have been trained since the signing of the Act in December 2010.
 - Of those agencies that track training, the largest number record certificates to establish training completion (26 agencies).
- *Adopt telework as a critical management tool into agency Continuity of Operations Plan (COOP)*. At the time of the Call, 75 agencies had included telework as part of their COOP plans.

While technology enables telework and forms the basis for successful programs, inadequate technology and data security issues are often mentioned as critical barriers to telework. Consequently, the Call included questions to assess technology implementation. Results indicate that more agencies bear the cost of equipping teleworkers (e.g., provide computers to teleworkers) than services to support telework (e.g., internet). Agencies report that steps are routinely taken to ensure data security.

Participation in Telework

The Call asked agencies to report telework participation and frequency during September and October 2011. Although this period of reporting was just a few months after the deadline for meeting Act requirements, a quarter of all employees deemed eligible to participate were reported as teleworking. Teleworkers tend to include more females, older employees, and those with longer agency tenure compared to the Federal population. Evident from the number of respondents, not all agencies were able to collect requested data.

	Total Number of Employees	Employees Deemed Eligible to Telework	Employees with Telework Agreements	Employees Teleworking in Sept 2011
Number of employees in each category	2,165,390	684,589	144,851	168,558
Number of agency respondents	86	82	82	87

Still, as often happens when innovations are introduced, Federal telework faces barriers to full implementation. Asked to describe ongoing challenges, several agencies reported resistance among key stakeholders (e.g., managers) as well as technology and security concerns.

How Often Do Employees Telework?

Achieving telework benefits, such as reductions in energy use, often depend upon how frequently employees telework. The Act also specified the importance of collecting data on the frequency of telework. As of the Call reporting period, many agencies did not have systems in place to track the number of days an employee teleworks. Of those agencies that were able to respond, results indicate fairly low rates of participation tend to predominate, with more than half of agencies reporting that teleworkers spend 2 or fewer days per week teleworking. Only 27 percent of teleworkers were reported as participating 3 or more days per week.

What Happens When Federal Employees Telework?

The Federal Employee Viewpoint Survey (FEVS) allows teleworking employees to be distinguished from those employees who are not able to telework because of a barrier (e.g., limited technology, not allowed to telework). In comparison to non-teleworkers facing barriers to telework, teleworkers are more likely to report knowing what is expected of them on the job and feeling as though they are held accountable for results. Teleworkers also reported a greater sense of empowerment, higher job satisfaction, and a greater desire to stay at their current job.

As in the 2010 report, results show that teleworkers and those who choose not to telework often have similarly favorable work attitudes. It is likely that employees who telework and those who do not experience similarly high levels of workplace autonomy and control. Both characteristics have been shown to be related to positive workplace attitudes.

Goals

The Act requires that agencies report an annual telework participation goal and encourages agencies to set and measure progress towards a variety of other goals. Since this is the first reporting year under the new law, the participation goals provided in this report pose a baseline for agency assessments of progress in the 2013 Report to Congress. Of responding agencies, 41 reported a participation goal as either a percentage or number of employees. Many agencies were still in the process of setting their participation goals at the time of the Call, and OPM will continue to work with those agencies over the coming months.

The Act also asked agencies to report results of assessments of any other goals the agency may have established for telework programs (e.g., emergency preparedness, recruitment and retention, performance). Emergency preparedness was the most frequently mentioned, while less commonly reported goals included reduced commuter miles, energy use, real estate costs, and improved employee performance. While measuring progress towards these goals remains a challenge, this report details examples of some of the innovative ways in which many agencies have begun to assess them.

Telework as a Tool for Achieving Social Goals

The Act directed OPM to initiate a review of the research on outcomes associated with an increase in telework, and make findings available to the public. Included in the appendices to this report are two reviews of the research literature examining the relationship between 1) telework, energy consumption, and transportation and 2) telework and job availability. Results of this review suggest a number of practical tips for approaches agencies could adopt to achieve goals. Examples include:

- Encourage employees with the longest commutes to telework
- Educate employees about how to best save energy while teleworking
- Encourage employers to make telework available to highly sought after and underserved employees (e.g. employees with high demand expertise, workers with disabilities, or Wounded Warriors).

Next Steps

OPM will continue to work in a consultative capacity with agencies to facilitate continuous telework program improvement, advancement of programs, and interagency learning. The focus in 2012-2013 will continue to be on goal-setting, goal measurement, and evaluation.

To address lingering data reliability issues, OPM has worked closely with payroll providers and agencies to develop a Governmentwide set of standards for data collection. These are being implemented by payroll providers and agencies; the resulting automated data collection will be pilot-tested during the summer of 2012. Findings from the pilot will be included in the next reporting cycle.

INTRODUCTION

The signing of the Telework Enhancement Act in December 2010 (the Act) set in motion a transformation of Federal telework that will have the effect of unleashing its potential as a strategic intervention for supporting agency effectiveness. Prior to the Act, telework was largely implemented through case-by-case approval of employees. Under the Act, telework is implemented as a strategic workplace flexibility offering expanded opportunities for participation (to the extent it does not diminish employee performance or agency operations), and the potential to substantially benefit individual employees and agencies alike.

The Act provides a framework of requirements designed to facilitate a more systematic implementation of telework in Federal agencies than previously existed and adequate notice to employees of their telework eligibility status. Satisfying requirements has meant a fundamental shift in how agency stakeholders are asked to view and implement telework -- from an individual employee benefit to an organizational change *program*. Implemented as a change program, telework supports achievement of objectives increasingly important for ensuring an efficient and effective Federal Government, including cost savings and improved performance. For example, by offering the flexibility many employees need to balance multiple life responsibilities, telework offers an incentive designed to retain high performing employees with consequent financial benefits for agencies. Beneficial outcomes occur directly and indirectly, for instance, through limiting the cost of turnover while retaining important knowledge assets (Horan & Wells, 2005).

Achieving anticipated benefits requires a substantial portion of eligible Federal employees to participate in telework on a regular, ongoing basis. According to reports issued prior to enactment of the Act, relatively few Federal employees teleworked and even fewer teleworked with the regular frequency that research indicates is necessary to achieve meaningful reductions in turnover, cost savings, reduced pollution or other goals (see Bailey & Kurland, 2002, for a review of the research literature, and www.telework.gov for prior status reports). The Act, however, provides the incentive and parameters for making telework more widely available to all Federal employees.

The Act established specific requirements for Federal telework, and satisfying these requirements meant substantial organizational changes in many agencies, with consequences for policies, workplace practices, and, ultimately, workplace culture. Results described in this report provide a new baseline for future assessments of Federal telework under the Telework Enhancement Act of 2010.

The following background section considers the context for Federal telework. The section describes the legislative background, key program requirements outlined in the Act for agencies, and OPM's role in advancing Federal telework – all aspects of context that work in unison to shape Federal telework.

BACKGROUND

The history and statutory framework for establishing telework began more than a decade ago as an effort to address transportation concerns and grew into an important flexible work arrangement and a powerful recruitment and retention tool for the Federal Government. . Over the years, telework has continued to receive attention due to its potential to improve employee morale, enhance work-life balance for employees, improve the competitive position of the Federal Government for recruiting and retaining the best and brightest workforce, increase Federal agency capacity to achieve mission and operational goals, and maximize organizational productivity.

In recent years, the focus has expanded to view telework as a strategic management tool for coping with potential disruptions in the workplace due to severe weather or other emergencies, and as a recruitment tool to increase access to talent pools. What seems clear is that telework will continue to receive attention within the Federal Government as a human capital strategic tool that provides a number of important benefits and flexibilities to organizations and employees alike.

Legislative History

Congressional interest in expanding the use of telework in the Executive branch began in earnest with the passage of Public Law 106-346 in 2000, which required each Executive agency to establish a policy under which eligible employees of the agency would be permitted to participate in telework to the maximum extent possible without diminished employee performance. Further legislation followed this mandate but the focus was more incremental and targeted specific agencies to increase telework participation by specified amounts.

The Telework Enhancement Act of 2010 (Public Law 111-292), which was signed into law by President Obama on December 9, 2010, built upon previous congressional action and provided a framework for Federal agencies to maximize the use of telework. In addition to establishing baseline expectations for the Federal telework program, the Act provided the legal framework for achieving greater flexibility in managing the Federal workforce through the use of telework. It also assigned specific duties and expanded responsibilities to OPM, and other partner agencies, for directing overall policy guidance to Federal agencies on an ongoing basis in an effort to help them build effective telework programs.

Act Requirements: Executive Branch Federal Agencies

Perhaps the most far reaching and ambitious achievement of the Act was the establishment of a more uniform and consistent approach to telework across the Federal Government. For the first time, Congress provided a consistent definition of what constitutes telework in the legislation, and applied it broadly to encompass most flexible work arrangements that allow an employee to perform his or her work at an approved worksite other than his or her assigned worksite:

“The term ‘telework’ or ‘teleworking’ refers to a work flexibility arrangement under which an employee performs the duties and responsibilities of such employee’s position, and other authorized activities, from an approved worksite other than the location from which the employee would otherwise work.”

Additionally, the legislation established expectations for all Federal Executive agencies with regard to telework policies, program implementation and reporting. A deadline of June 30, 2011, was established for meeting agency requirements in the Act. First and foremost, each Federal agency was required to establish a policy under which eligible employees would be allowed to telework, to determine employee eligibility to participate in telework, and to notify all employees of their eligibility status. Federal agencies continue to exercise maximum flexibility to establish telework policies based on their individual mission and operational needs and to ensure that any such telework program does not diminish employee performance or agency operations.

To ensure consistency and continuity for telework programs across the Government, the Act further directed Federal agencies to:

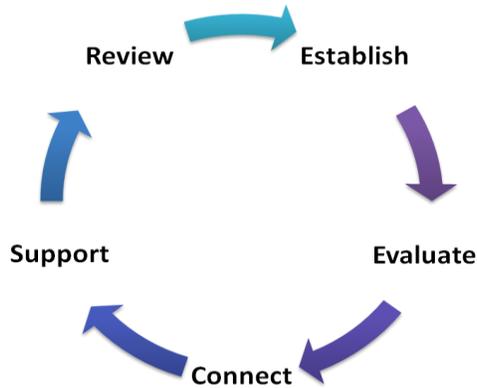
- designate a Telework Managing Officer (TMO) who would be responsible for policy development and implementation (In addition to serving as an advisor for agency leadership and a resource for managers and employees on all matters related to telework, the TMO also is required to consult and coordinate with OPM to satisfy mandatory annual data collection and reporting requirements.);
- determine and notify all employees of their eligibility to telework;
- require a written agreement between an agency manager and each of his or her employees authorized to telework;
- ensure that an interactive training program is provided to eligible employees and their managers and that the training is successfully completed by employees prior to entering into a telework agreement unless specifically waived by the head of the agency; and
- adopt telework as a critical management tool into its Continuity of Operations Plan (COOP).

U.S. Office of Personnel Management: Advancing Federal Telework

The Act also outlines a number of specific responsibilities for OPM. These responsibilities support the consultative role OPM has long held with agencies, especially in policy guidance, and mandate continued maintenance of the Federal telework website (currently available at www.telework.gov). The Act expands OPM’s role in telework program assessment and data collection, charging OPM to assist agencies in establishing appropriate qualitative and quantitative measures and goals for telework programs. Moreover, OPM, in collaboration with agencies, is required to compile and submit an annual report to Congress on the telework programs of each agency, a requirement addressed here. Specific content is established for the report, for example, degree and frequency of participation in telework by employees in each

agency, number and percentage of employees eligible to participate in telework, and results of any assessments of outcomes associated with telework.

The Governmentwide telework program is managed by OPM's Work/Life/Wellness (W/L/W) office. Prior to the Act, the office developed a model for advancing telework (shown below).



In many aspects, the model aligns with the Act, especially in its emphasis on OPM consultative services, evaluation, and measurement. These reinforce the central role of OPM's W/L/W office in the advancement of telework. Model components include:

- **Establish:** Goals for advancing telework are outlined in the Act and established by individual agencies. W/L/W supports efforts to establish telework goals through workshops, feedback on research results and individual consultations.
- **Evaluate:** W/L/W conducts ongoing data collection through various research programs to assess agency telework program implementation, processes and outcomes, and assist agencies in similar data collection. Data are collected through custom instruments (e.g., periodic Data Call, focus groups, survey of Federal employees), and other existing sources (e.g., agency surveys, FEVS, payroll and Human Resources data).
- **Connect:** We share results and useful lessons learned through evaluation with the Federal telework community, including agencies and other stakeholders.
- **Support:** W/L/W helps agencies develop and implement programs through training (e.g., in telework, action planning, evaluation) and policy guidance. We provide consultative services as needed for building robust individual agency programs (e.g., program implementation, policy analysis).
- **Review:** We analyze research findings, evaluation findings and lessons learned on a continuing basis to assess Governmentwide progress in advancing telework.

REPORT CONTENT

The scope of the report has been dictated by several objectives, the first being to address content requirements established in the Act. The Act focuses attention on participation in telework agencies, with content spelled out as [Public Law 111-292, 6506(b)(2)]:

- (a) degree of participation by employees of each executive agency in telework;
- (b) method for gathering telework data in each agency;
- (c) reasons for observed increases/decreases greater than ten percent in telework participation;
- (d) agency participation goals for the next reporting period;
- (e) actions taken to identify and eliminate barriers in cases where goals were not met;
- (f) assessment each agency has made in achieving any identified, non-participation goals (e.g., energy use, recruitment, retention, employee attitudes);
- (g) best practices in agency telework programs.

Given OPM's consultative role with agencies, a second objective for this report has been to provide useful information to agencies as they strive to establish, develop, and sustain telework programs. The specific requirements for Federal telework outlined in the Act meant substantial organizational changes in many agencies. Successful change initiatives are directed by evaluation (Worley & Cummings, 2004), consequently, researchers in the Work/Life/Wellness (W/L/W) office, U.S. Office of Personnel Management, took this report as an opportunity to initiate systematic evaluation of Federal telework programs.

At the time of data collection, agencies were finalizing implementation of program parameters established as requirements under the Act (e.g. notifying employees of telework eligibility). Notably, *change initiatives cannot produce intended outcomes until they have been fully implemented and the culture change necessary to support telework has occurred.* Consequently, this inaugural telework status report under the Act is largely focused on program implementation questions, and broad questions guided the research:

- What portion of the Federal workforce teleworks?
- How are telework programs implemented under the Act?

Results provide a new baseline for evaluation of Federal telework under the Act.

About Goal Assessments and Best Practices

The Telework Enhancement Act of 2010 tasks OPM with reporting “an assessment of the progress each agency has made in meeting agency participation rate goals during the reporting period, and other agency goals relating to telework” [Public Law 111-292, 6506(b)(2)] and “the best practices in agency telework programs [Public Law 111-292, 6506 (b)(2)(G)].”

Establishing just how successful agencies have been in satisfying established goals (participation and outcome) relate to questions of program effectiveness. Some initial insights are provided

regarding Governmentwide goals for telework in the analysis of Federal Employee Viewpoint Survey data. Agencies have just established goals for their programs and these are reported in this report. Assessments of how well these goals have been achieved will be reported once agencies have systematic data with the appropriate time-depth to assess their achievement.

Best practices are established by linking evidence of program effectiveness with practice in order to identify those systems and routines that are most likely to result in desired outcomes. At this implementation stage, agencies are in the process of establishing goals and outcomes; it is too soon to describe any particular set of practices as clearly “best.” However, results of focus groups conducted as part of this study are integrated throughout the report and provide insights into practices that agencies have found to be useful for advancing telework (see Appendix 1 for the full focus group report).

The study for this report employed multiple methods in a phased research design. These are described next.

METHODOLOGY

A first step for initiating this telework research project was to operationalize key definitions in the Act. An Interagency Telework Measurement team of agency subject matter and method experts was assembled in January 2011¹. To operationalize the definition, the team considered an essential question: *Who should be included in counts of telework?* The final definition guided all phases of research and was included in the data collection instruments described in this section.

Telework is a work arrangement that allows an employee to perform work, during any part of regular, paid hours, at an approved alternative worksite (e.g., home, telework center). This definition of telework includes what is generally referred to as remote work but does *not* include any part of work done while on official travel or mobile work. See the following clarifications on remote and mobile work.

- Remote work: A work arrangement in which the employee resides and works at a location beyond the local commuting area of the employing organization's worksite. The arrangement generally includes full-time telework (Note: a recent addition

¹ The group was assembled and led by Dr. Kimberly Wells, U.S. Office of Personnel Management. Members included acknowledged leaders and experts in Federal telework including: Dr. Wendell Joice, U.S. General Services Administration; Danette Campbell, U.S. Patent and Trademark Office; Pam Budda, U.S. Department of Defense; Aaron Glover, Defense Information Systems Agency; Karen Meyer, United States Navy; Scott Howell, National Aeronautics and Space Administration; Bruce Murray, U.S. Department of Energy; and Dr. Alexis Adams, Christina Heshmatpour, Elnora Wright, and Clint Sidwell, U.S. Office of Personnel Management.

clarifies this definition by stipulating that remote work may result in a change in duty location to the alternative worksite (e.g., home).²

- Mobile work: Work which is characterized by routine and regular travel to conduct work in customer or other worksites as opposed to a single authorized alternative worksite. Examples include site audits, site inspections, investigations, property management, and work performed while commuting, traveling between worksites, or on Temporary Duty (TDY).

The Interagency Telework Measurement Advisory Group further specified two forms of telework for research purposes. They are distinguished primarily on the basis of schedule:

- Routine: telework that occurs as part of an ongoing, regular schedule; and
- Situational: telework that is approved on a case-by-case basis, where the hours worked are not part of a previously approved, ongoing and regular telework schedule. Examples of situational telework include telework as a result of special work assignments or doctor appointments. Situational telework is sometimes also referred to as episodic, intermittent, unscheduled or ad-hoc telework.

The Logic of Telework Programs

Fundamental questions initiated and guided planning for this evaluation of Federal telework. Sample questions asked included:

- Which stakeholders should be included in the data collection effort?
- What resources are necessary for the development of the program?
- What outcomes can be anticipated in the short or long term once the program is implemented?

Following best practices and shown below, a logic model was developed at the outset of the study (shown in Figure 1). It addresses basic evaluation questions and functioned as a guide to the study design and data collection.

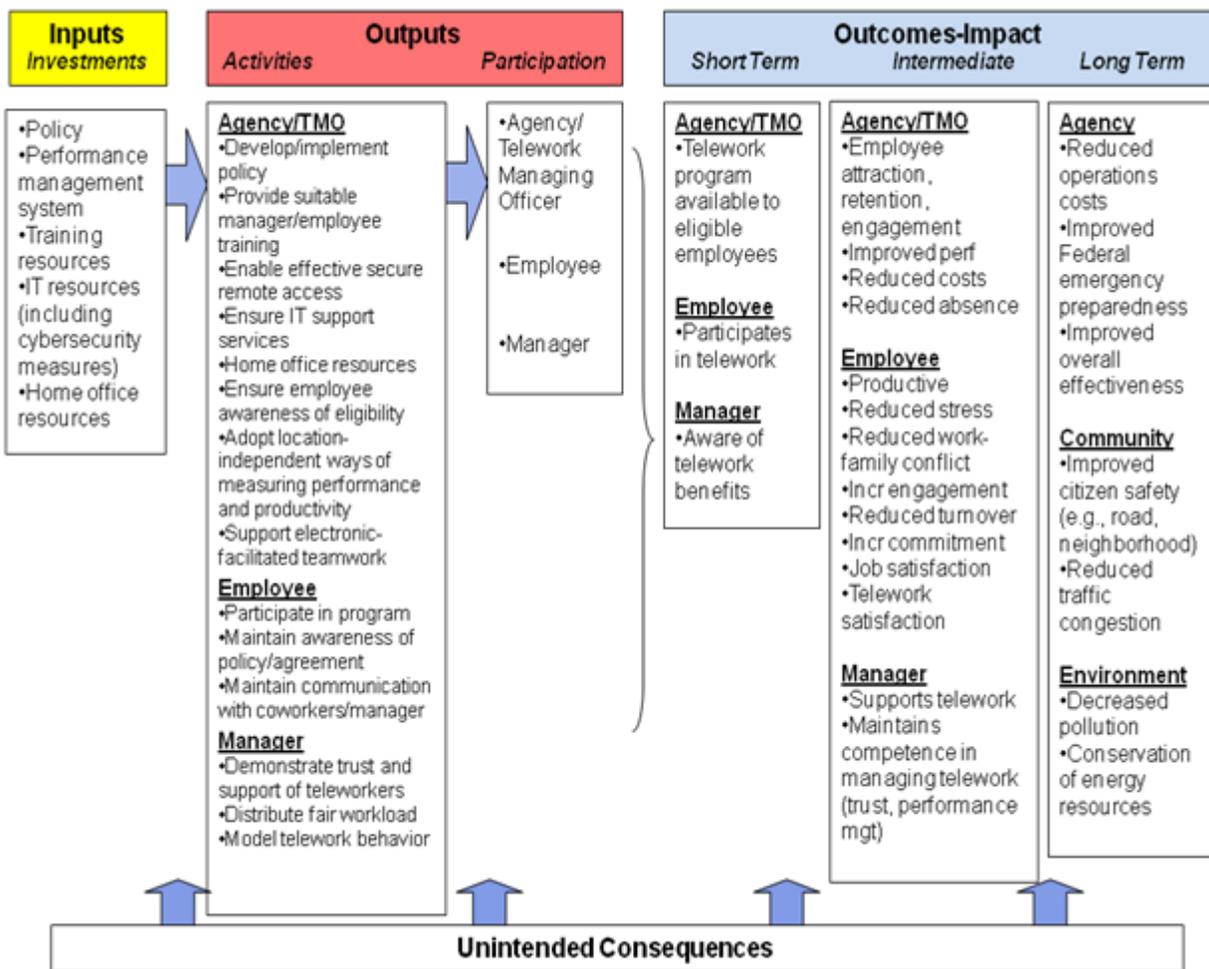
Throughout the report, reference is made to telework program implementation and outcomes. As illustrated in the model, implementation questions consider program resources, activities, and stakeholders (shown on the left side of the model). Whether anticipated outcomes are attained depends largely upon how successfully telework programs are implemented. In fact,

² This definition reproduced here was in place at the time of the Call and guided agency data collection efforts. At the writing of this report, OPM notes that remote work arrangements may result in the employee working full-time from the location beyond the worksite with only occasional visits to the office, as opposed to the currently more typical telework arrangement, where employees are expected to return to the applicable work site on a regular basis.

failure of programs to achieve expected outcomes often reflects a failure to completely or adequately implement a program (Rossi, Lipsey, & Freeman, 2004).

Some outcomes can be expected to occur rather quickly with the implementation of a program (e.g., telework participation). Other outcomes, particularly broad community changes (e.g., reduced traffic congestion and pollution), are only recognized once a critical mass in participation and telework frequency has been achieved. Early adopters of innovative interventions like telework usually participate in numbers too small to achieve large-scale community or environmental outcomes.

Figure 1: Federal telework logic model



Research Design

The research reported here is designed to incorporate quantitative and qualitative data gathered from the primary stakeholders shown in the logic model: the agency Data Call (the Call), archival data from OPM's Federal Employee Viewpoint Survey (FEVS) and focus groups

with Telework Managing Officers and coordinators. Each data source is used to capture the perspective of a stakeholder group instrumental in the success of telework.

The Call provides a platform for the systematic collection of descriptive data for program practices in each agency. Liberal use of open-ended items is made in the Call, providing some explanatory data from the agency perspective.

Employee data from the FEVS provides an important complement to the agency perspective in that it offers an opportunity to understand telework programs from the “customer” perspective. Results from analysis of FEVS data allow description of Federal employee participation in telework, reasons for non-participation, and participant satisfaction with telework programs. Further, findings from the FEVS also allow for some insights into workplace outcomes related to telework (e.g., job satisfaction, employee development). A major strength of the FEVS is that it allows comparison of teleworkers and non-teleworker experiences and perceptions – a more robust design for establishing linkages between program and outcomes.

Finally, focus groups with TMOs and program coordinators provide rich description of the context in which telework successes occur as well as some of the challenges and opportunities faced by agency stakeholders in establishing these programs. Final results are included in the report to provide important contextual and explanatory data for interpreting results from the surveys.

The table shown in Appendix 3 displays the link between anticipated effects, measures, and data sources. Methods used to assess listed questions/topics are described.

Method Summary

The methodology used in the research is summarized next. For a more detailed description, see the appendices and links referenced in descriptions.

Telework Data Call

Various versions of the Call have been issued to Federal agencies since 2001. The Call has been revised frequently in response to changes in context and Federal telework policy. The current version of the Call instrument was developed to assess program changes made in response to the Act.

Under the Act, Executive branch agencies are required to report telework data to OPM for inclusion in the annual status report to Congress.³ A number of agencies also were required to report telework participation and frequency data at the sub-agency/component level. Participation in the Call is currently the only way for agencies to comply with data submission requirements in the Act. Note that several agencies not covered by the Act (e.g., the Smithsonian Institution), and thus not required to participate, nonetheless elected to do so.

³ Section 6501(2) states that executive agencies are those set forth in section 105.

The Call provides the agency perspective through questions that address agency telework participation and program implementation and processes (e.g., how employees are deemed eligible, how employees are trained and equipped for telework). The instrument used for the 2010 Data Call was revised in 2011 to ensure alignment with the Telework Enhancement Act (see Appendix 4 for more details on the methodology of the Call, and see Appendix 6 for the electronic version of the Call included in the on-line survey platform).

The list of agencies included in the Call was compiled using OPM records (lists from OPM Human Capital Officers, lists from OPM statisticians, lists from previous Data Call administrations) and correspondence with agency points of contact (POCs) for telework (see Appendix 5 for a list of agencies and sub-agencies included in the Call survey administration). For each agency, a telework coordinator or TMO was designated to enter agency data into an online survey platform. Access to the platform was gained through a unique username and password assigned to each agency data entry POC. To protect data integrity, only one agency POC was supplied with access to the data entry system.

The Call was administered between October 26 and December 9, 2011. Agency respondents were invited to participate in the Call by email. Three reminders were sent to POCs and TMOs during the administration period for the Call. Prior to issuance of the Call, data entry points of contact for agencies, coordinators, and TMOs attended three briefings on the Call's content and timeline, which included opportunities to ask any questions. Through these meetings, agency POCs and others involved in telework data collection were familiarized with the Call content. In discussion, specific attention was given to definitions, instructions for data collection and the importance of data quality. Briefings were provided in an effort to support reporting of valid and reliable telework data.

The results of the Data Call give insight into agency efforts and progress in implementing the Act, how many and how Federal employees telework, summaries of agency goal setting efforts, and outcomes related to telework. Agency data provide a detailed picture of current Federal telework activities. Program descriptions are particularly valuable and will provide opportunities for interagency sharing of best practices.

Yet, there are some limitations with respect to the participation and frequency findings that should be considered. Agencies rely upon differing methodologies and data sources when gathering participation and frequency data, including time and attendance systems, counts of telework agreements, and surveys of employees. Without a standardized Governmentwide data collection system or trained data collection staffs, the final estimates of combined telework participation numbers are unlikely to be completely valid or reliable. In particular, many agencies do not have the capability with their current systems to collect all requested data (e.g., situational telework). As a result, the final participation and frequency numbers may underreport telework with consequences for the reliability of reported results.

Federal Employee Viewpoint Survey (FEVS)

The FEVS has been administered Governmentwide to Federal employees since 2002. The survey captures employee perceptions regarding how well the Federal Government runs its human resources management systems. Three items in the FEVS address telework. The first asks respondents to identify whether they are eligible to telework. The second item asks employees to choose an answer option that best describes their own participation in telework, with response options enabling teleworkers to be distinguished from non-teleworkers, and to provide reasons for non-participation in telework. The third item asks respondents to rate their satisfaction with the telework program in their agency.

The methodology for FEVS data collection is well-documented elsewhere. To summarize, the survey is administered to full-time, permanent employees of Departments and large agencies and small/independent agencies that accept an invitation to participate in the survey. The source for results reported in this document, the 2011 survey, was collected from a sample of employees in most agencies (see <http://www.fedview.opm.gov> for a more detailed description).

Methodological Distinctions between the Call and FEVS

Our understanding of Federal telework is enriched by the unique and important perspectives offered by the Call (agency) and FEVS (employee). Each resulting dataset addresses important and complementary questions. However, there are differences between the two instruments that drive dissimilarities in findings and make one-to-one comparisons of results inappropriate. These should be considered when interpreting reported findings.

- Perspective. While the Call and FEVS overlap somewhat in content, the unique perspective offered by each should be kept in mind. This difference means that results for the Call and FEVS are *not* directly comparable. The Call represents agency perspectives and represents official records for telework participation. The FEVS provides an important employee perspective, but is based on individual self-reports and results may differ from official agency records.
- Timeframe. In 2011, the Call and the FEVS represent snapshots of telework behavior at complementary but separate points in time. For past Calls, agency data has varied in the timeframe represented – from single snapshots of discreet time periods to annual averages. In the Act, agencies were given a deadline of June 2011 for implementing telework program requirements (e.g., notify all eligible employees), but not every agency was able to meet that deadline. To achieve an accurate picture of *implemented* Federal telework, OPM elected to collect data for a specified timeframe directly after the time the majority of agencies had satisfied program requirements. Call instructions directed respondents to report data for the months of September and October 2011, or as near as possible to that time period.

The FEVS was administered prior to the June deadline for implementing requirements under the Act, during April and May 2011. For this reason, FEVS results should not be taken as indicative of the impact the Act may have on telework, especially participation rates. In sum, the FEVS represents a pre-Act baseline, while the Call is more representative of programs post-implementation of Act requirements. Taken together, the two provide a complementary timeline, but results from the two surveys are not directly comparable.

- **Baseline Data.** Both the FEVS and Data Call instruments administered in 2011 were updated to address requirements in the Act. For this reason, it is difficult to directly compare 2010 and 2011 FEVS telework results regarding participation in telework. Certainly, aligning measurement with the requirements of the Act mandated such a complete overhaul of the Data Call instrument that current findings cannot be compared to results found in the 2010 telework status report. Results from both the FEVS and Call represent new and important baseline data for assessing the impact of the Act on future telework.

Focus Groups: Telework Managing Officer and Coordinators

The Call made liberal use of open-ended items and response options (e.g., “other”) to allow each agency POC plentiful opportunities to expand and explain answers. Such explanations provide important information for understanding unique responses and the contexts in which Federal telework operates, especially barriers and supports to full implementation of programs. However, in general, responses to survey items are not sufficiently systematic or detailed to fully describe the supports or constraints that may operate to advance or hinder Federal telework. Consequently, to collect the necessary qualitative explanatory data, the 2011 research protocol incorporated focus groups held with key stakeholders: TMOs and coordinators.

See Appendix 1 for the full focus group report, including a detailed discussion of methodology. In September 2011, the W/L/W staff conducted four focus groups with agency representatives to learn more about how telework programs have been implemented and managed across the Federal Government. Group participants explored general foundations for telework program success, challenges to the advancement of agency programs, influence of the Act, and key lessons learned by agencies as they continue to develop and expand telework programs.

Focus group participants were chosen at random from a list of agencies (the same list used to identify participants to the Telework Data Call). TMOs and coordinators were invited to participate in the focus groups by email. Every group followed a structured questioning route developed prior to the meetings. Each session lasted two hours. Note-takers recorded each session and the resulting data were content-analyzed to identify recurrent themes, linkages between themes, and unique features of agency telework programs.

Overall, the mixed method research design (i.e., combination of qualitative and quantitative techniques) employed in this study provides a rich and detailed baseline picture of telework in the initial formative stage for Federal telework programs under the Act. Research in subsequent years will continue to expand the scope of questions posed and outcomes examined.

RESULTS

Presentation of results begins by examining agency progress in meeting Act requirements for telework program implementation. Findings draw primarily upon analysis of data from the Call.

Please recall that several agencies not covered by the Act, and therefore not required to participate, elected to respond in the Data Call. As a result, some of the ostensible non-compliance with Act requirements reflected in responses (e.g., appointment of a Telework Managing Officer) is attributable to the participation of these organizations.

Focus group results are incorporated with results from the Data Call wherever possible in an effort to provide a more complete understanding of the supports and/or constraints operating as agencies worked to fully implement telework programs in accordance with the Act. Noted earlier, focus groups also provide important insights into current practices in Federal telework. While it is too soon at this implementation stage to identify practices that might prove to be “best,” focus group findings do outline a number of promising practices. These are described for results whenever possible and at the end of the report to foster interagency learning.

Telework Implementation

Act requirements provide a basic framework for program implementation and standardize fundamental aspects of Federal telework. A focus group participant noted “the Act helped us because it gave us the legal edge we needed to do some of the things we needed to do The Act helped us to get a better picture of what’s actually going on and to be able to explain telework a bit more. It gave us the spotlight for a little while”

Results described next show the extent to which Federal telework programs included Act requirements at the time of the Call in the late fall of 2011.

How Have Agencies Met Program Requirements in the Telework Enhancement Act?

Satisfying requirements in the short timeframe allocated under the Act was truly a herculean effort for most agencies, especially given typically slim staff and resources.⁴ In some agencies, satisfying the Act essentially meant building a new program, and for other agencies, it meant significantly changing an existing program. A number of agencies were still working to satisfy requirements immediately prior to administration of the Data Call in October 2011. Notably, the effort necessary to implement or transform telework programs varied across agencies. For

⁴ The Act was signed in December 2010 and included a deadline of June 2011 for satisfying requirements.

example, it was more challenging for large agencies when compared with small agencies to notify all employees of their eligibility to participate in telework.

Aligning Agency Telework Policies with the Act

In nearly every agency the telework policy had to be revised in order to align with the Act. The law set forth two limitations -- relating to official discipline for either viewing pornography or being absent without permission for more than five days in any calendar year -- as ineligibility criteria for telework participation [Public Law 111-292, 6502(a)(2)(A)(B)]. Prior to the Act, these criteria were not included in eligibility standards established by agencies, and their inclusion required agencies to revise policies.

Revising and implementing telework policies is a slow and lengthy process involving multiple levels of internal review including, in some cases, bargaining with labor unions. Table 1 shows that although 73 percent of agencies had either existing or new policies that met the requirements of the Act, as of September 30, 2011 (date specified in the question asked of agencies), 26 percent of respondent agencies were still working to update policies to incorporate requirements of the Act. The Smithsonian Institution has a policy in place that does not meet all requirements, but it is not subject to the Telework Enhancement Act of 2010.

Table 1: Telework policy status at the time of the Data Call

Status of Telework Policy	Number of Agencies	Percentage of Agencies
Agency has a policy in place, and it has been revised and approved to include requirements of the Act (e.g., written telework agreements).	60	70%
Agency has a policy in place but it does not include the Act requirements; agency is currently working to update [the policy] to incorporate elements of the Act not already included.	23	26%
Agency had an existing policy in place that met the requirements of the Act.	3	3%
Agency has a policy approved, but it does not include all of the requirements of the Act.	1	1%
Total	87	100%

Total number of responding agencies = 87

Designating Telework Managing Officers

Any successful organizational change depends upon leadership support. It is particularly critical that telework program decisions be aligned with intra-agency strategic thinking and planning, given the potential for telework to influence outcomes for entire departments/agencies. The Act required the head of each Executive agency to designate a TMO within “the Office of the Chief Human Capital Officer or other comparable office with similar functions” [Public Law 111-292, 6505(a)]. This placement ideally brings management of telework programs into the circle of top leadership and ensures alignment with strategic decision-making. At the time of the Call, only two responding agencies had not yet appointed either an acting or permanent TMO. The two that did not were actually not covered by the Act, and thus not bound to adhere to requirements in the Act.

Table 2: Status of Telework Managing Officer Designations

The Telework Managing Officer as of this Data Call is:	Number of agencies*	Percentage of agencies
Permanent	75	86%
Acting	10	12%
We do not currently have a Telework Managing Officer	2	2%
Total	87	100%

*Total number of responding agencies = 87

Creation of the TMO position was a frequently discussed topic in focus groups. According to the Act, the TMO serves “as an advisor for agency leadership...a resource for managers and employees, and a primary agency point of contact for the Office of Personnel Management on telework matters.” Prior to the Act, telework coordinators typically performed many of the functions outlined for TMOs. Under the Act, some agencies appointed coordinators as TMOs, but many more did not, sometimes with challenging consequences.

At the time of the focus groups in September 2011, TMO position implementation was still a work in progress. Participant comments reflected uneven results. In some agencies, the addition of the TMO was reportedly quite effective. TMOs were able to directly access senior leadership, and the relationship between coordinators and TMOs was described as a true partnership.

Other focus group comments revealed less positive situations. For example, while the TMO is meant to serve as an advisor to senior leadership, several focus group participants noted that TMOs have encountered difficulties gaining access to leadership. Limited leadership access makes it difficult to position telework as an effective strategic management tool. Several coordinators also noted that the addition of the TMO position resulted in an extra layer of

oversight, making it difficult to complete projects and goals. Such challenges will need to be resolved to ensure future telework program effectiveness.

Notifying Employees of Telework Eligibility

The Act requires agencies to notify all employees of their eligibility to participate in telework. Prior to notifying employees, agencies first determined which employees were eligible. Criteria for *ineligibility* were established in the Act and include any employee who "has been officially disciplined for being absent without permission for more than 5 days in any calendar year" and/or who "has been officially disciplined for violations of subpart G of the Standards of Ethical Conduct of Employees of the Executive Branch for reviewing, downloading, or exchanging pornography, including child pornography, on a Federal Government computer or while performing official Federal Government duties." [5 U.S.C. 6502(a)(2), as enacted by Public Law 111-292]

Criteria for participating in telework were also established in the Act. These were presented in the instructions defining eligibility for participation in the Call. Respondents referenced this definition to describe eligibility standards for agencies. The definition states:

"An employee is **eligible to participate** in telework if all of the following parameters are true:

- The employee has not been officially disciplined for being absent without permission for more than five days in any calendar year.
- The employee has not been officially disciplined for violations of subpart G of the Standards of Ethical Conduct for Employees of the Executive Branch for viewing, downloading, or exchanging pornography, including child pornography, on a Federal Government computer or while performing official Federal Government duties.
- Teleworking does not diminish the employee's performance or agency operations.
- For employees participating in the telework program, participation and performance complies with the requirements and expectations of his or her telework agreement.
- The employee's official duties do not require on a FULL daily basis (ALL DAY, every work day): direct handling of secure materials determined to be inappropriate for telework by the agency head; or on-site activity that cannot be handled remotely or at an alternate worksite.
- The employee and/or the employee's position are not disqualified based on additional criteria established by the organization" (see The Guide to Data Standards retrievable on http://www.opm.gov/feddata/GDS/GDS_A08.pdf).

The last bulleted parameter in the definition assumes agencies may have criteria for disqualifying employees from telework in addition to those listed in the Act. In the Call, agencies were asked to describe these additional criteria, if any. Performance ratings that fell below specified levels were reported most frequently by agencies that listed additional eligibility criteria beyond those described in the Act.

Table 3: Criteria used by agencies for determining eligibility to participate in telework

Additional Eligibility Criteria	Of all agencies	Of agencies with additional criteria
Performance rating not at required level	40%	78%
Required period of employment not satisfied	25%	49%
Category of employee not allowed to participate	14%	27%
Conduct that resulted in disciplinary action	26%	51%
*Note: 45 agencies reported using additional criteria, which represents 52% of respondent agencies.		

At the time of the Call, a total of 684,589 Federal employees had been determined eligible to telework. This number represents 32 percent of the employee population of 2,165,390 reported by agencies.

In compliance with Act requirements, most agencies had either notified or were making progress in notifying employees of their eligibility to telework at the time of the Call.

Table 4: Employee eligibility notifications

Have all agency employees been notified of their eligibility to participate in telework?	Number of agencies (n=87)	Percentage of agencies
Yes	75	86%
No	5	6%
In progress	6	7%
Other*	1	1%

*Some participant agencies are not covered by the Act and thus are not required to adhere to the Act. In this case, eligibility issues are left to unit directors who respond on an “as requested” basis.

The law did not specify the form that eligibility notification should take (e.g., blanket email, in-person notification), and agencies reported using a variety of methods to contact employees regarding telework eligibility. A “general, mass or agency-wide email” was the most frequently selected response as shown in Table 5.

Table 5: Methods used by agencies to notify employees of telework eligibility

How were employees notified [of telework eligibility]	Number of agencies using method*
All eligible employees were notified via a general, mass or agency-wide email	48
Each employee was notified of his or her eligibility via personal communication (e.g., email, conversation with supervisor)	39
Other	19
Have not notified/finished notifying	11

*Multiple methods are often used by divisions located within the same Department/agency. To respond to this item, agencies were advised to mark all that apply, thus the total exceeds the 87 responding agencies.

Focus group participants described the challenges some agencies faced in notifying employees of their eligibility to telework. As an example, a participant commented that there was “lots of initial push-back from managers who didn’t want to encourage telework. Lots of effort was put into making managers understand that being notified of eligibility does not mean that an employee would be allowed to telework. [We] worked to make managers understand that notifying employees was simply part of Act requirements (law).”

Effective telework programs rely upon continued employee participation. To this end, it is important that agencies notify new hires of their eligibility to telework. Most agencies (86 percent) also reported that they *do* notify newly hired employees of their eligibility to participate in telework (Table 6).

Table 6: Status of eligibility notification for newly hired employees

Do you notify <i>new</i> employees of telework eligibility?	Number of agencies (n=86)
Yes	70
No	8
Yes, some subcomponents	4
Other	4

Establishing Written Telework Agreements

The Act mandates that a written agreement must be established between the manager and an employee authorized to telework before he or she may participate in telework. The Call asked agencies to indicate how many employees had a telework agreement. According to records maintained by the 82 agencies that provided responses to this question, a total of 144,851 employees have a telework agreement with their managers. A comment made by a focus

group participant illustrates the diligence with which agencies approached satisfying Act requirements for telework agreements: “We made several changes. We did a big overhaul of the policy that was issued in October 2010 . . . Some negotiation had to be done. We had to negotiate telework agreements for everybody; they used to be only for regular basis teleworkers.”

Agencies were asked: *When does your agency renew telework agreements?* Shown in Table 7, agencies renew telework agreements in response to changing circumstances (e.g., change in supervisor) and/or to a fixed schedule.

Table 7: Renewing telework agreements

When does your agency renew telework agreements?*	Number of agencies**
Telework agreements are updated according to a fixed schedule	37
Telework agreements are updated when there is a change in supervisor	42
Telework agreements are updated when a position change occurs for the employee	51
Other	35

*Not all agencies have the systems in place to track telework agreements.

**Agencies were instructed to mark every applicable option; consequently, total responses exceed the number of agencies (n=87).

Training for Telework

The Act requires heads of agencies to ensure that interactive telework training is provided to “(A) employees eligible to participate in the telework program of the agency; and (B) all managers of teleworkers.” [Public Law 111-292, 6503 (a)(1)(A)(B)]

Passage of the Act helped ensure that training was applied more uniformly across stakeholder groups, including managers. Focus group participants illustrate this point, commenting, for example that “There used to be training only for teleworkers, not managers. That’s changed. We had tried to do that before and it didn’t make it until the Act.” This is another example of how the Act, by imposing a mandate, provided the impetus needed by telework program staff to expand certain telework related objectives.

The Act does not specify training sources. Because agencies often use multiple forms of training, the question in the Call listed a number of the forms available to Federal agencies and asked respondents to indicate those training options used in an agency.

Results of manager and employee training options are presented separately in Tables 8 and 9. The most frequently listed source of training for both groups was the web-based telework training available on OPM’s website (www.telework.gov).

Table 8: Telework training sources for managers

Type of Training (Managers)	Number of Agencies*	Percentage of Agencies
Customized, in-person telework training developed in-house and provided by the agency	22	25%
Customized web-based telework training developed in-house and provided by the agency	10	11%
Web-based training posted on OPM's telework website (www.telework.gov)	59	68%
Agency contracts with a vendor to develop and/or provide telework training (web-based or in-person training)	7	8%
Training through OPM's Eastern Management Development Center/Western Management Development Center	1	1%
Training through the USDA graduate school (a course currently titled: "Telework: A Manager's Perspective.")	2	2%
Training provided through other sources.	9	10%

*Total responses exceed the number of agencies, because POCs were instructed to mark every applicable option .

Table 9: Telework training sources for employees

Type of Training (Employees)	Number of Agencies*	Percentage of Agencies
Customized in-person telework training developed in-house and provided by the agency	19	22%
Customized web-based telework training developed in-house and provided by the agency	11	13%
Agency contracts with a vendor to develop and/or provide telework training (e.g., web-based or in-person)	4	5%
Web-based training posted on OPM's telework website (www.telework.gov)	61	70%
Training provided through other sources.	10	11%

*Total responses exceed the number of agencies, because POCs were instructed to mark every applicable option .

In the Data Call, agencies were also asked to report the number of employees and managers who had received some form of telework training since the signing of the Act. With training a prerequisite to telework participation (with certain exemptions specified in Section 6503(b) of the Act), this question was posed as a way of gaining some sense of the influence the Act may have had on advancing telework participation. However, data collection methods often did not permit agencies to respond to this question. Thirty-four agencies were not able to distinguish employees who had been trained after the signing of the Act, and 15 agencies reported that they do not maintain records of telework training. In those that do track training (30 agencies), a total of 166,348 employees have been trained since the signing of the Act in December 2010.

A follow-up question asked respondents to describe how they verify completion of telework training for employees and managers. Of those agencies that track training, the largest number record training certificates (26 agencies). Note that other methods unique to individual agencies were also described, for example, polling of employees, observation of staff meetings where training was provided, and record maintenance by individual managers.

Table 10: Training verification methods

Please describe how your agency verifies employee/manager completion of training for telework:	Number of Agencies (n=42)
Certificate	26
Classroom list	4
Electronic system	12

Telework and Emergency Preparedness

As noted previously, the Act recognized telework as an important tool for ensuring continuity of operations in emergencies. The Act directs Executive branch agencies to *incorporate telework into the continuity of operations plan of that agency*. Consequently, all agency telework programs should show evidence of a concerted effort to incorporate telework into strategies to ensure continued agency ability to meet essential mission and operational goals during an emergency.

In briefings prior to the Call, agencies were advised to consult with emergency preparedness staff for answers to emergency preparedness questions. The same instructions were given in the Call instrument. The intent was to ensure factual reporting based on actual records.

Data entry POCs were asked to indicate how the agency incorporated telework into emergency plans at the time of the Call. Emergency plans are intended to continue operations during emergency situations, adverse weather conditions, natural disasters or other incidents causing disruptions of Government operations. As evident in Table 11, telework is incorporated into agency Continuity of Operations Plans and Pandemic Influenza Plans. Telework policies also

typically include information regarding the use of telework during an emergency, and teleworkers are trained in expectations for teleworkers during emergencies.

Table 11: Reports of agency efforts to incorporate telework into emergency planning

	Yes*	No	Agency does not have this plan	Other
The agency Continuity of Operations Plan specifically addresses telework.	75	4	8	-
The agency Pandemic Influenza Plan specifically addresses telework.	66	5	16	-
The agency’s telework policy includes information regarding telework during emergencies (e.g., who is supposed to telework).	67	7	-	13
Agency teleworkers are given specific training about what is expected of them in an emergency.	30	28	-	29

*Total number of responding agencies = 87.

OPM’s guidance for Federal telework (www.telework.gov) emphasizes the importance of conducting periodic exercises to ensure staff members are experienced and comfortable with telework in an emergency. Twenty-three agencies reported that they do conduct telework exercises for at least those employees required to telework in an emergency. However, many more agency POCs (43) report that they do not conduct telework exercises to encourage employees to gain experience with teleworking in an emergency.

Table 12: Telework exercises for telework in an emergency

Does your agency conduct telework exercises to encourage employees to gain experience with teleworking in an emergency?*	Number of Agencies (n=86)
Yes, for all employees.	8
Yes, for those employees required to telework during emergencies only.	15
No.	43
Not able to find this information.	4
Other	16

Responses to a follow-up question indicate that 27 agencies conducted telework exercises primarily as part of emergency planning. ‘

Table 13: Purpose of telework exercise

Are these exercises intended primarily as part of emergency planning?	
Yes	27
No	4
Other	1

Beyond Act Program Requirements: Technology

Technology drives and provides the foundation for successful telework. Participants to TMO and telework coordinator focus groups emphasized the importance of technology to telework programs. In summary, when technology is *inadequately* addressed in program implementation and management, technology can become a major barrier rather than a facilitator of the advancement of telework.

An entire section of the Call was devoted to understanding technology implementation and telework programs. Questions began by assessing how agencies equip teleworkers. Unlike prior Calls, the 2011 form treated equipment and services separately.

As shown in Table 14, agencies tend to provide equipment (e.g., computers) to, or share the cost of equipment with, participants in telework (46 agencies). Responses summarized in Table 15, however, suggest it is more commonplace for agencies to ask teleworkers to pay for the technology services that support telework (e.g., internet).

Table 14: How agency teleworkers are equipped

Which of the following best describes how the majority of teleworkers in your agency gain access to work-related equipment to telework?	Number of Agencies (n=81)
Agency provides equipment	20
Teleworker purchases equipment	15
Costs are shared	26
Other	20

Table 15: How teleworkers access work-related technology services

Which of the following best describes how the majority of teleworkers in your agency gain access to work-related services (e.g., internet) to telework?	Number of Agencies (n=82)
Agency provides services	7
Teleworker pays for services	50
Costs are shared	12
Other	13

Some agency policies require teleworkers to use only agency-provided equipment. Meeting this standard can hinder the advancement of telework, as illustrated in this focus group comment: “This is an austere budget environment, so if you’re an agency with less telework already, and less available equipment, it will be a challenge to equip everyone that will be teleworking.”

Telework can be an important tool for enhancing continuation of essential agency functions in case of emergency (e.g., weather, accidents). Since telework depends upon the support and availability of technology, testing of all pertinent Information Technology (IT) capacities to support telework is a fundamental aspect of program implementation. Moreover, achieving long-term outcomes (e.g., pollution reduction, energy conservation) requires that technology resources be adequate to support widespread and frequent participation in telework. Tests to ensure this capacity are, again, essential.

Table 16 shows that most agencies test IT capacity. Perhaps surprisingly, few agencies (8) report conducting tests according to a regular schedule. Those agencies that reported testing their IT capacity also generally commented that their systems had adequate capacity for handling increased usage due to telework emergencies.

Table 16: Testing of agency information technology capacity to support telework

How frequently does your agency test its IT capacity to support telework?	Number of Agencies (n=82)
Never tested.	1
Conducts tests according to a regular schedule (e.g., monthly, quarterly).	8
Tests, but not according to a fixed schedule.	24
Does not test specifically for telework.	24
Not able to find this information.	5
Other	20

The Act directs the National Institute of Standards and Technology (NIST) to issue guidelines ensuring that adequate information and security protections for information and information systems are available for telework. Fully implemented telework programs include policy guidance aligned with NIST guidance. As shown in Table 17, most agencies (72 percent) report that telework policies are consistent with NIST guidelines.

Table 17: Consistency of telework policy with NIST standards

In terms of the information security matters addressed, our agency's telework policy is consistent with the guidance provided by NIST at http://csrc.nist.gov/telework?	Number of Agencies (n=79)
Yes	59
No	3
Not sure	9
Other	8

Substantially more respondent agencies have integrated telework into their overall information security policy (46), rather than develop a separate telework information security policy (15).

Table 18: Agency policy for telework and information security

Which of the following best describes your agency's policy governing telework and information security?	Number of Agencies (n=79)
Our agency has a separate, written telework information security policy.	15
Our agency is currently developing a separate policy.	4
Telework is covered under our agency's overall policy.	46
Other	14

Evident in Table 19, Federal agencies have established a variety of protocols for securing personally identifiable information when employees telework. Data security continues to be a key focus for agencies as they implement telework.

Table 19: Security of personally identifiable information (PII)

How does your agency secure PII while employees are teleworking?	Number of Agencies
All PII information is encrypted.	36
All PII files are password protected.	26
Privileged Rules of Behavior are signed for those handling PII.	26

How does your agency secure PII while employees are teleworking?	Number of Agencies
Only those with a compelling need are allowed to download PII.	32
Two Factor Authentication is used for remote access.	47
Only Government-furnished equipment is allowed for teleworking.	21
No PII, sensitive or classified information is allowed to be removed physically from the agency facility.	34
No PII, sensitive or classified information is allowed to be transmitted electronically from the agency facility.	20
Other	22

Participation and Frequency

Shown in the logic model, employee participation in telework is a critical antecedent to desirable program outcomes. How telework occurs (e.g., frequency) is an equally important consideration. Long-term outcomes, such as improved agency effectiveness, energy savings and decreased pollution, assume widespread and frequent participation in telework. Items in the Data Call provide baseline data for assessing participation and frequency.

Participation and frequency of participation data were collected by agencies using various methodologies. A question in the Call asked agencies to identify how they determined the number of teleworkers. Agencies described a number of methods for identifying participation and frequency of participation, including tracking through a time and attendance system (46 agencies), counting telework agreements (19 agencies), and/or through a customized telework electronic tracking system (11 agencies). Other methods included an internal survey of managers (5 agencies) or polling timekeepers (6 agencies). Many agencies used various methods for collecting participation data.

The Call included several questions probing participation and the frequency of participation. The first question asks:

- ***Are employees participating in Federal telework programs?***

Appendices 8 and 10 detail baseline participation data for each agency and sub-agency that responded to the Call. Summary results are shown in Table 20. Just a few months after implementing the Act requirements, agency records show that 21 percent of all employees determined to be eligible had a telework agreement with their manager. However, 25 percent of eligible employees were reported as teleworking. This misalignment between eligibility and agreements reflects limitations in the data collection systems of some agencies, as several agencies do not yet have a formal system for tracking telework agreements. As seen in Table

20, the number of agencies able to respond varied across items, indicating that some agencies were unable to provide the information.

Table 20: Summary highlights of telework participation as of September 2011

	Total Number of Employees	Employees Deemed Eligible to Telework	Employees with Telework Agreements	Employees Teleworking in Sept 2011
Number of employees in each category	2,165,390	684,589	144,851 (21 percent of eligible employees)	168,558 (25 percent of eligible employees)
Number of agency respondents to items	86	82	82	87

Agency participation numbers vary both between and within agencies (see Appendices 9 and 11 for detailed participation data by agency and sub-agency). Among agencies, the percentage of eligible employees who telework range from 0 to 82 percent. Some agencies use the number of telework agreements to estimate telework participation; consequently, some reported participation numbers may be overestimates. This is because some employees may have telework agreements in place for emergencies, but choose not to telework on a regular basis. A more accurate picture is likely to emerge as agencies move toward using time and attendance systems to count teleworkers. A planned Governmentwide automated telework data collection system will ensure more valid and reliable data.

The high participation rates shown for some agencies are encouraging evidence of progress in expanding Federal telework participation. However, to satisfy unique mission and operational goals, even low- to mid-range participation may represent effective use of telework for individual agencies. For this reason, care should be taken when interpreting the participation numbers shown in Appendices 8 – 11.

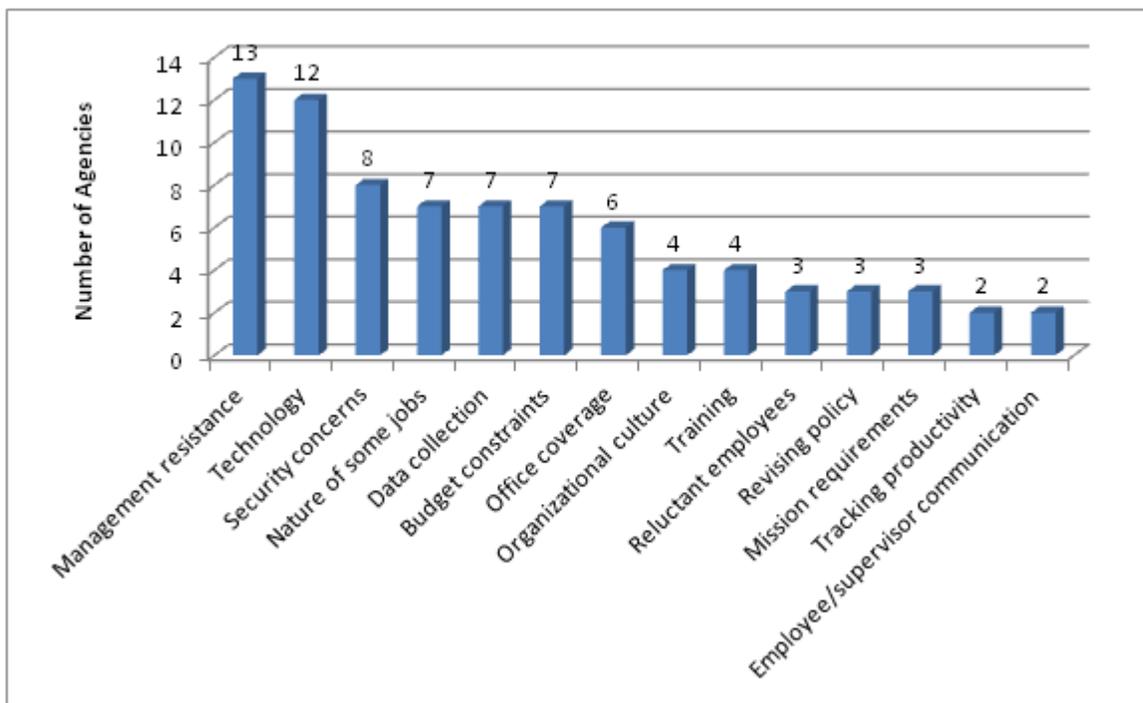
Notable participation rates for large agencies include the Patent and Trademark Office (82%), General Services Administration (59%), Department of the Treasury (48%), Department of Health and Human Services (42%), and the Department of Education (41%). Many smaller agencies reported high rates of participation as well, including the Appraisal Subcommittee of the Federal Financial Institutions Examination Council (70%), the National Mediation Board (77%), the Institute of Museum and Library Services (62%), the Nuclear Waste Technical Review Board (58%), the Federal Labor Relations Authority (57%), and the Committee for Purchase from People Who Are Blind or Severely Disabled (54%).

Participation numbers are also quite diverse within agencies, with some reporting as much as 50 percentage point ranges between their subcomponents. Here again, interpreting the

numbers requires some caution. For some agencies, these wide disparities may represent organizational pockets that have been slower to embrace telework. However, for others these disparities may be evidence of their best strategic use of telework as a workplace flexibility. Subcomponents may report fewer teleworkers in instances where employees primarily deliver services directly to clients or work in the field. Comparatively higher participation rates may occur for subcomponents in which employees work primarily in an office setting.

As is typical of change interventions, a number of potential barriers to telework implementation have been identified. In the Call, agency respondents were asked to describe any ongoing challenges they faced in fully implementing telework. Resistance among key stakeholders (e.g., managers) is widely described for change initiatives, and was described by respondents to the Call (see Figure 2) and by TMOs and coordinators in focus groups. Technology and security concerns were described by current agency respondents, paralleling results reported in previous Data Calls. Other barriers reflected in the chart below are inherent in the Federal system. For example, revising policies is a notoriously slow process given the often complex and multi-layered reviews required.

Figure 2: Barriers to telework implementation in Federal agencies



- ***How do employees telework?***

As noted earlier, outcomes often hinge upon frequent and/or regular employee participation in telework. Consequently, the Act specified the importance of collecting data that describes the frequency with which Federal telework occurs.

Table 21: Frequency of participation in telework

	3 or more days teleworking per week	2 days teleworking per week	1 day teleworking per week	Once a month per week
Number of employees in each frequency category	46,023	47,675	41,727	5,637
Percentage of all reported teleworking employees by frequency category	27%	28%	25%	3%
Number of agency respondents to item	84	85	81	39

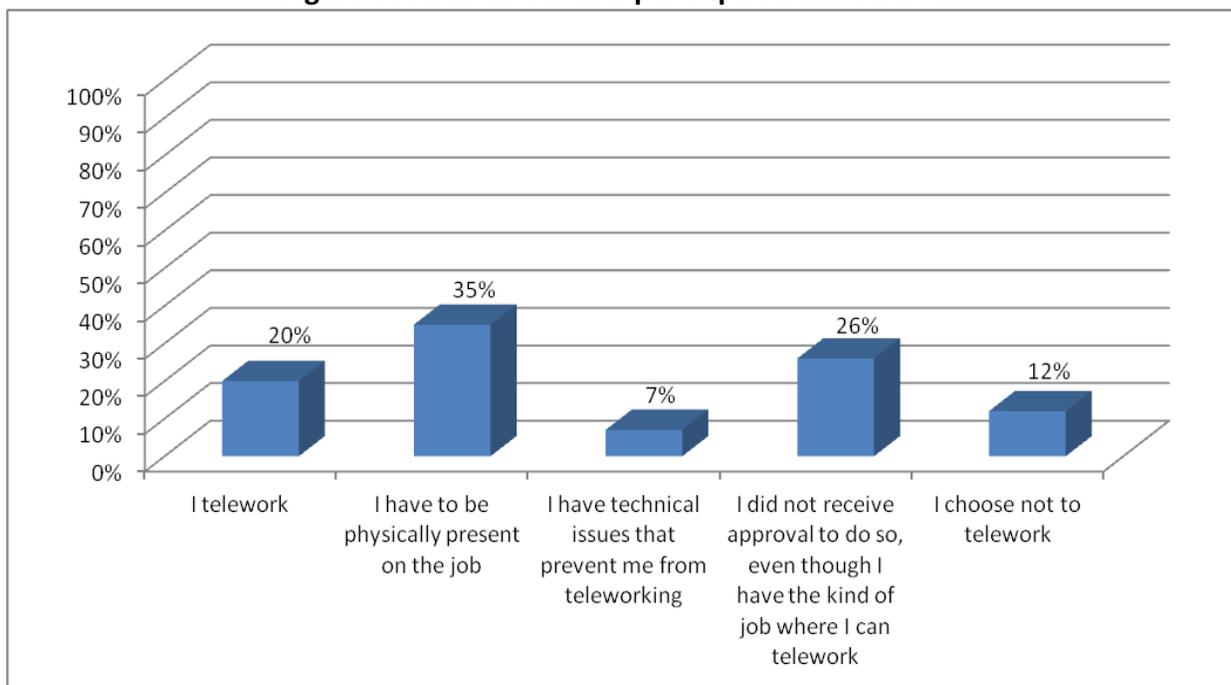
Totaling 141,062, employee numbers reported for teleworkers across frequency categories sum to fewer than the total number of teleworking employees (168,558). The reasons for the apparent discrepancy vary; in some cases agencies were simply not able to report telework by participation frequency. In other instances, the frequency categories typically describe routine telework, and many employees participate in telework on a situational basis instead.

Agencies reported a total of 21,251 situational teleworkers. Only 35 agencies responded to this question, reflecting the fact that relatively few agencies are currently able to track situational telework. Situational telework can be a particularly important tool in emergency situations, unforeseen weather conditions, and similar circumstances. Consequently, efforts to measure situational telework are an ongoing priority for OPM.

- ***What are the reasons for non-participation in telework?***

One of the telework items in the Federal Employee Viewpoint Survey provides employees with an opportunity to specify not only if they telework, but also to select reasons they do not telework. The 2011 FEVS was administered prior to the implementation of the Act; therefore, it provides important baseline information about behavior prior to the implementation of telework under the Act. As shown in Figure 3 below, required physical presence on the job is the most frequently provided reason for not teleworking (35%). Another 26 percent did not receive approval to telework, even though they perceive their job as being amenable to telework.

Figure 3: Reasons for non-participation in telework



What about participation in mobile work?

As illustrated earlier, mobile work is excluded by definition from the counts of teleworkers in the Data Call. However, it is an increasingly popular way for agencies to meet their customers' needs. Relatively few respondent agencies (29 of 87) offer mobile work or were able to track its use. Under these limitations, Call respondents reported a total of 4,238 mobile workers.

Who teleworks?

Ensuring that decisions whether to permit employees to telework are based upon the appropriate criteria and rendered fairly is an important consideration for implementing any new policy. Through both the Data Call and focus groups, agency representatives expressed concerns over equity and described their efforts to ensure that all employees have an equal opportunity to telework if their jobs are amenable to teleworking. Analysis of FEVS data provides some insights into the demographic characteristics of the Federal teleworking population. We also can examine how the demographic characteristics of teleworkers differ from those who do not telework by choice and those who do not telework because of a barrier.

Once again, before drawing conclusions about the following findings from the FEVS, it is critical to note that the survey was administered prior to the Act taking full effect. Thus, reported demographic findings cannot be attributed to changes set in motion by the Act. Prior to the signing of the Act, however, there was substantial momentum to expand telework participation across the Federal Government and results do demonstrate how the expanding telework population has changed since the last FEVS administration in 2010.

Figure 4 and Figure 5 describe the proportion of Federal teleworkers by gender and supervisory status. According to the FEVS, a slightly higher percentage of teleworkers are male (51%) than female (49%). This is a change from the last FEVS administration which found that more teleworkers were female, but as shown in Figure 4, the percentage of women is greater among teleworkers than is typical of the Federal population (49% versus 43%). Additionally, an overwhelming majority (81%) of teleworkers hold non-supervisory positions, a similar proportion to the Federal population (82%).

Figure 4: Gender distribution of respondent teleworkers

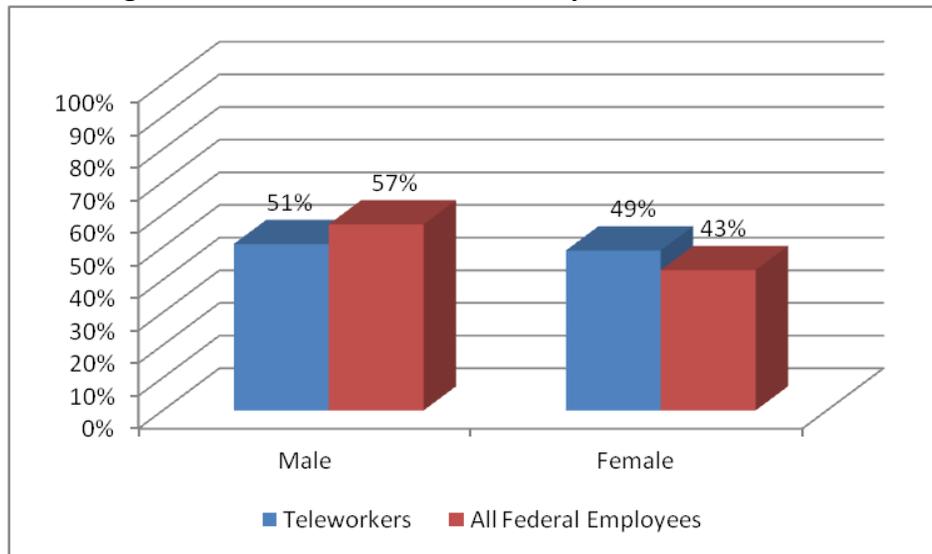
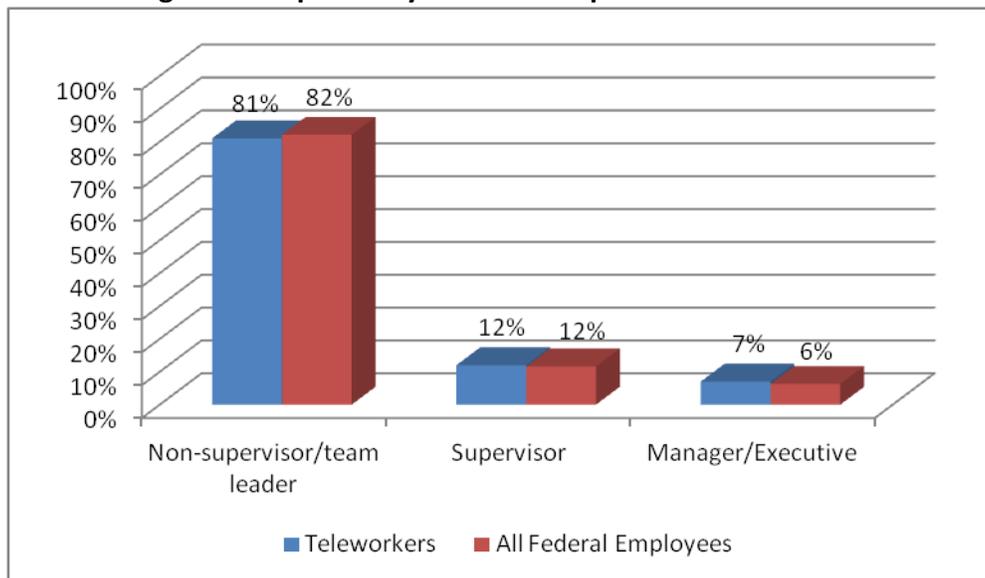


Figure 5: Supervisory status of respondent teleworkers



The age distribution of Federal teleworkers is shown in Figure 6. More than a third of teleworkers are between the ages of 50 and 59 (34%). Far fewer teleworkers are below the age of 40 (24%). This largely reflects the current demographic distribution of the Federal workforce which is generally older. In a related finding, Figure 7 displays the distribution of teleworkers by

time in their agencies. Again, only about a third of teleworkers (33%) have been with their current agency for five years or less, while about two thirds have been with their agency longer. In comparison to the Federal population, teleworkers tend to have slightly longer agency tenure.

Figure 6: Age distribution of respondent teleworkers

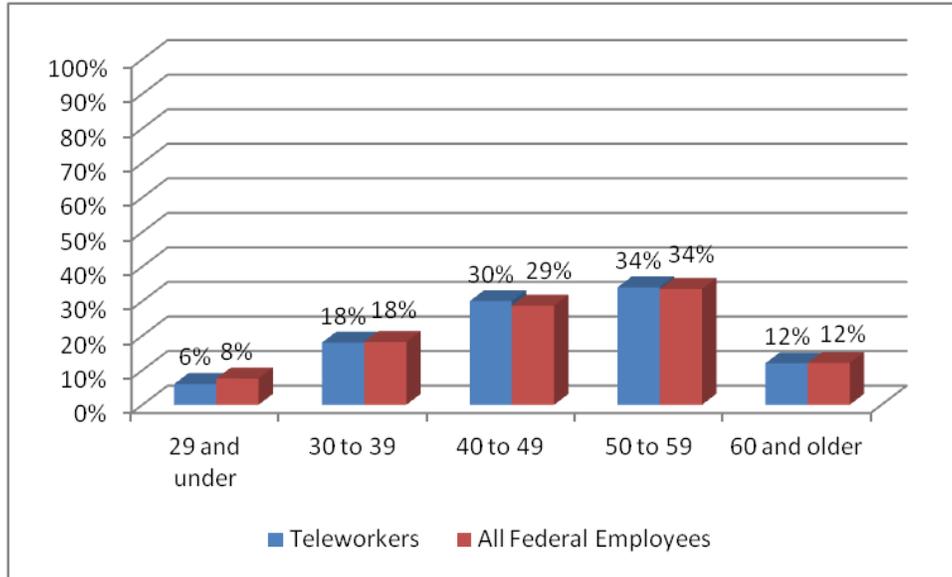
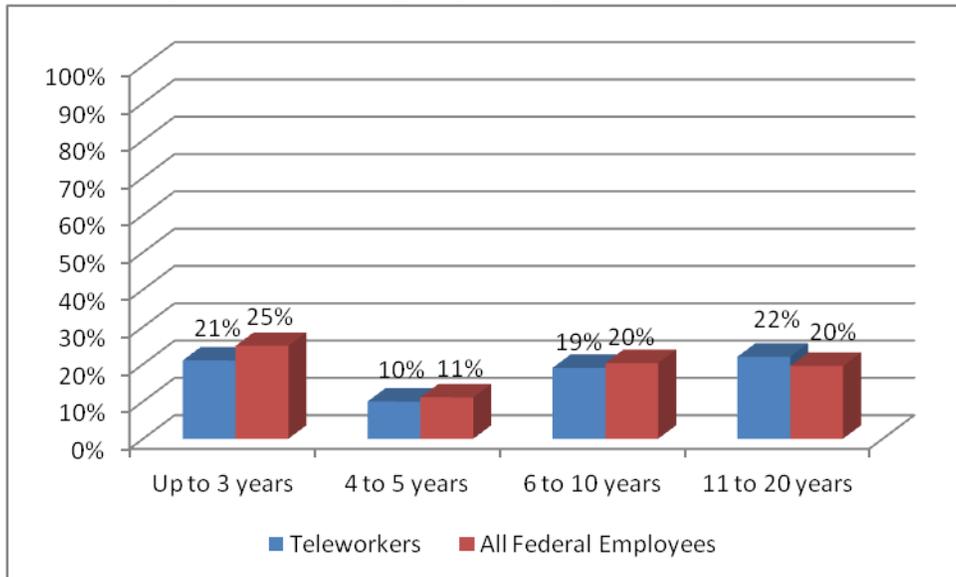


Figure 7: Time in agency of respondent teleworkers



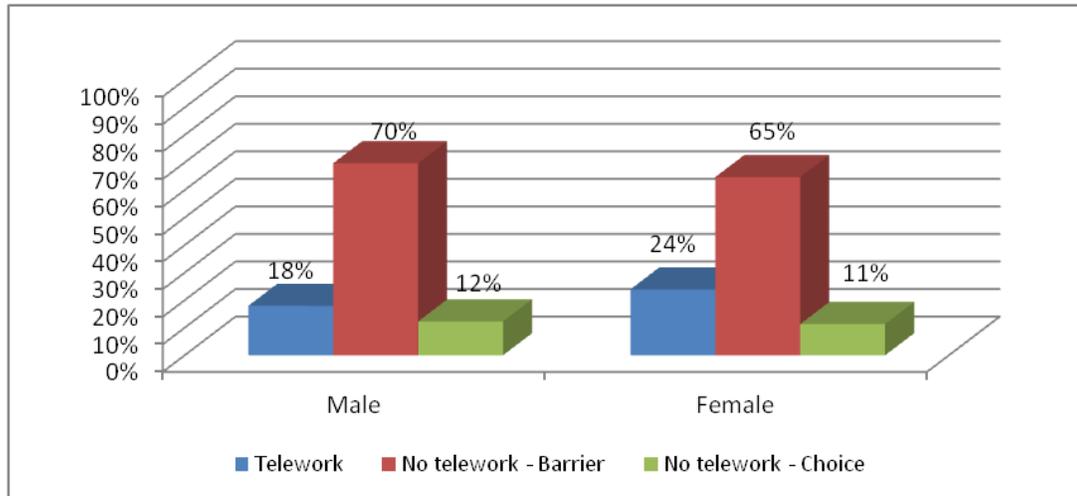
The next figures, also based on FEVS results, compare the demographic characteristics of teleworkers and non-teleworkers. It is important to note the difference between the previous figures and those that follow. The previous figures show how Federal teleworkers are distributed across various demographic categories as compared to the entire Federal

workforce. The following figures show the *percentage of employees* that telework and do not telework within a variety of demographic groups. So, for example, in Figure 8 it is shown that 18% of male employees telework. In Figure 4, it is shown that 51% of teleworkers are male.

For the purposes of simplifying the analysis, the FEVS telework participation item is collapsed here into three categories: employees who telework, employees who do *not* telework because of a barrier (e.g., not allowed, limited by technology), and employees that do *not* telework by choice.

Figure 8 shows that a greater proportion of females telework (24%) than males (18%). Additionally, males (70%) are more likely to report a barrier to participation in telework than females (65%).

Figure 8: Comparison of teleworkers and non-teleworkers by gender, as a percentage of the total workforce



Turning to supervisory status in Figure 9 it appears that more supervisors (21%) and managers (23%) telework than employees in non-supervisory positions. However, it is important to note that the differences are small. Moreover, employees in non-supervisory positions (68%) are more likely to report barriers to participating in telework than managers and senior executives (61%). Conversely, managers and executives most often reported choosing not to participate (16%). This is an important point since it is useful for supervisors and managers to telework, if only occasionally. When supervisors model telework behavior it sends a powerful message of support for similar employee participation. The fact that employee participation is somewhat similar across job types represents progress towards achieving wider acceptance of and more equitable access to telework.

Figure 9: Comparison of teleworkers and non-teleworkers by supervisory status, as a percentage of the total workforce

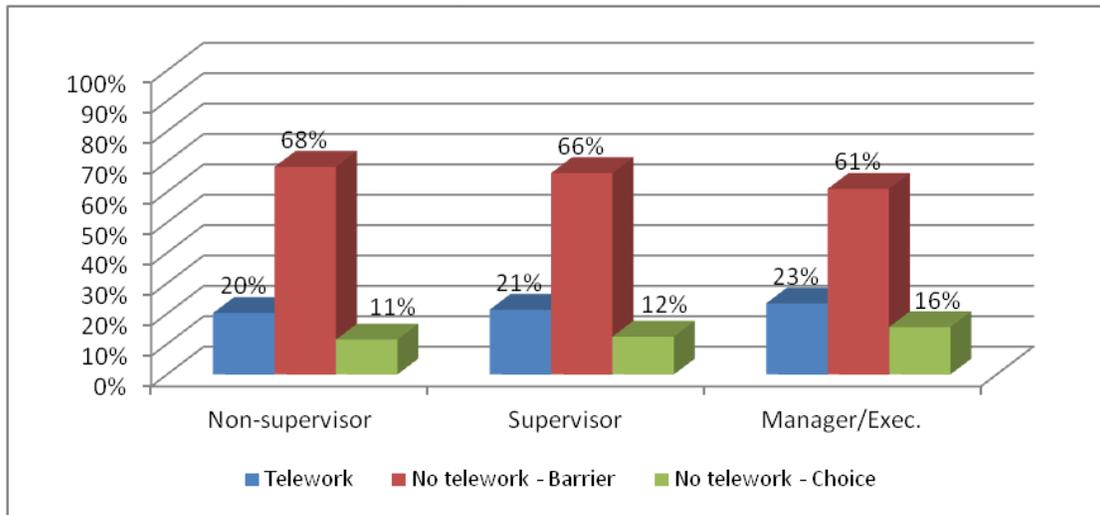
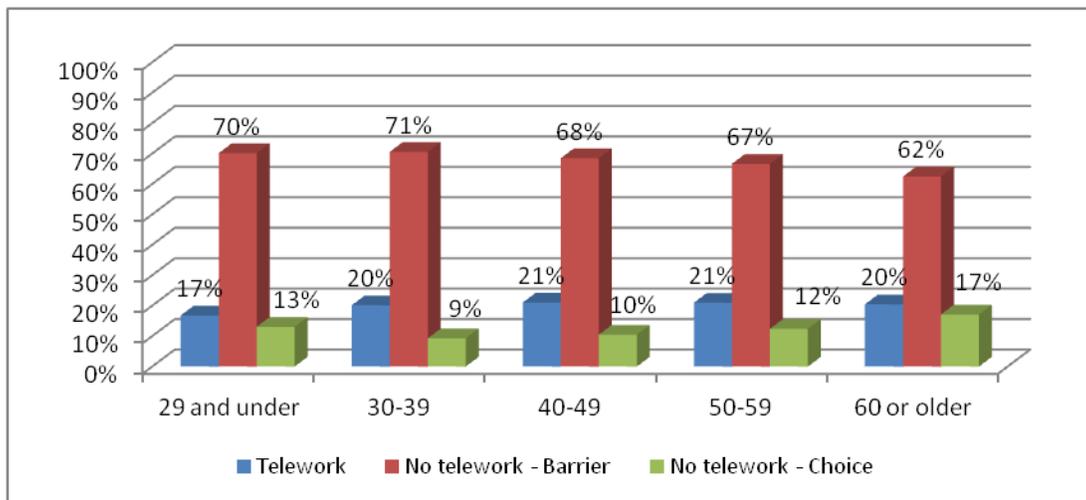


Figure 10 compares teleworkers and non-teleworkers by age group. The proportion of employees that telework does not differ much by age, with one exception. Only 17 percent of young employees (age 29 and under) reported that they telework, compared with 20 to 21 percent of employees in other age groups. Employees under age 40 most frequently report barriers to participation (70 to 71%), while employees between 50 and 59 years old and over the age of 60 most often report choosing not to participate (12% and 17% respectively). Notably, some agencies have policies prohibiting telework for employees with short tenures in the agency.

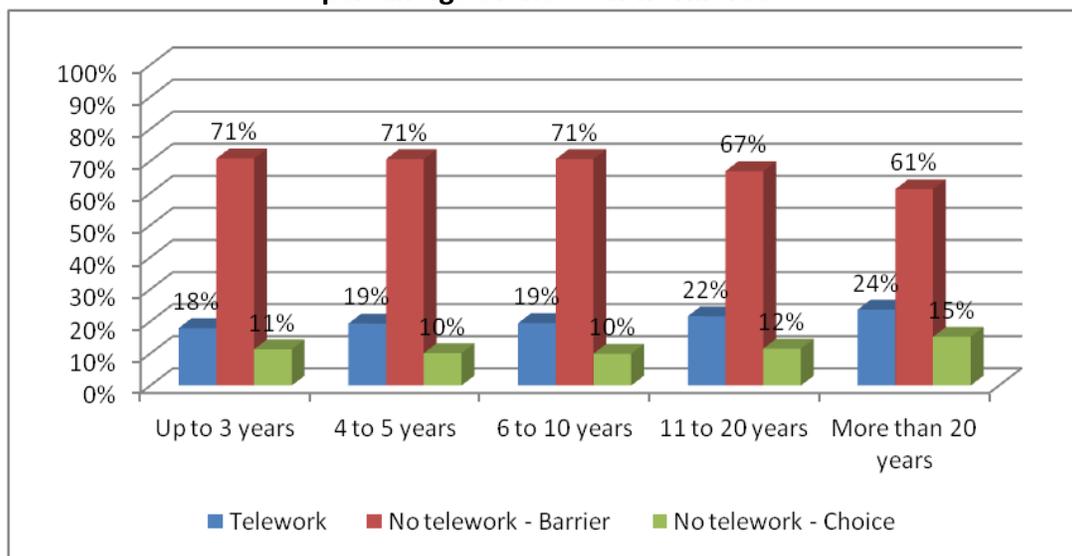
Figure 10: Comparison of teleworkers and non-teleworkers by age, as a percentage of the total workforce



There is evidence that employees with longer agency tenure participate in telework at higher rates than those with shorter tenures. As shown in Figure 11, employees who have worked for

the same agency for 20 years or more telework at the highest rate (24%), perhaps explaining the age effect noted above. In comparison, the participation rate for employees who have been with their agency for up to three years is only 18 percent. Employees with the longest tenure are more likely to report choosing not to telework (15%) compared with other groups (10-12%). Those who have been in their agencies ten years or less, more often report barriers to telework participation (71%), compared with employees who have worked with an agency 11 to 20 years (67%) and more than 20 years (61%).

Figure 11: Comparison of teleworkers and non-teleworkers by time in agency, as a percentage of the total workforce



What Happens When Employees Telework?

Described in the beginning of the report, the shift in telework policy in response to the Telework Enhancement Act constitutes a profound organizational change. These change programs are generally engaged to reach individual, agency and community goals. Achieving identified outcomes is, consequently, an essential driver in the adoption of telework in Federal agencies and gauging success means assessing what happens when employees telework.

For the employee, anticipated outcomes related to telework include job satisfaction and other workplace attitudes and perceptions. For the agency, telework may impact recruitment and retention, result in energy savings, reduce building needs, and better emergency preparedness among other outcomes. At the societal level, telework could potentially have beneficial environmental impacts or create new job opportunities for certain individuals.

Evaluating progress in achieving targeted outcomes varies by outcome and agency due to continuing measurement challenges and the fact that many programs are still in early stages of implementation. Yet, the 2011 Data Call and FEVS do provide noteworthy evidence of progress towards setting goals and evaluating outcomes. The following sections describe the evidence for a wide range of employee, agency, and societal outcomes.

Goals and Outcomes: The Employee Perspective

Telework has the potential to contribute to a number of outcomes relating to the experiences of the individual employee. OPM remains committed to encouraging agencies to measure and evaluate outcomes related to employee satisfaction and other aspects of well-being on the job. Outcomes considered here broadly encompass the workplace experience, employee performance, and job satisfaction. The FEVS contains several items that are useful for analyzing how telework impacts the employee.

Once again, for the purposes of simplifying the analysis, the FEVS telework participation item is collapsed here into three categories: employees who telework, employees who do *not* telework because of a barrier (e.g., not allowed, limited by technology), and employees that do *not* telework by choice. The following series of charts examine these aspects of telework/non-telework as it relates to a variety of workplace outcomes.

The 2011 FEVS data supports the findings reported in OPM's 2010 telework status report to Congress that teleworkers and those who choose not to telework have much in common, whereas employees who report facing barriers to telework report lower job satisfaction, less positive views of their organization, lower support from their supervisors, and overall lower scores on measures than do their teleworking counterparts.⁵ Results overall provide a number of encouraging insights useful as the basis for further study of individual agency programs or action planning for continuous telework program improvement efforts.

As in the 2010 report, results of subdividing teleworker respondents in analysis often show similarly favorable percentages between those who telework and those who choose not to telework. Keep in mind that long-standing research beginning in the 1960s with Hackman and Oldham shows that work characterized by autonomy tends to relate favorably to workplace attitudes. Building upon such findings, very early telework researchers theorized that telework operates to increase the level of employee autonomy with beneficial employee outcomes likely to occur (Shamir & Saloman, 1985).

It is especially beneficial to the psychological well-being of eligible employees when they are given the *choice* of whether to participate in telework or not. In fact, the Telework Enhancement Act of 2010 clearly emphasizes the importance of implementing telework on a voluntary basis.

Managing Performance

Increasingly, the success of telework programs is recognized as being highly dependent upon appropriate performance management practices. OPM outlines a number of components for effective performance management (<http://www.opm.gov/perform/overview.asp>), including setting performance expectations and goals. As in the 2010 report, two FEVS items are

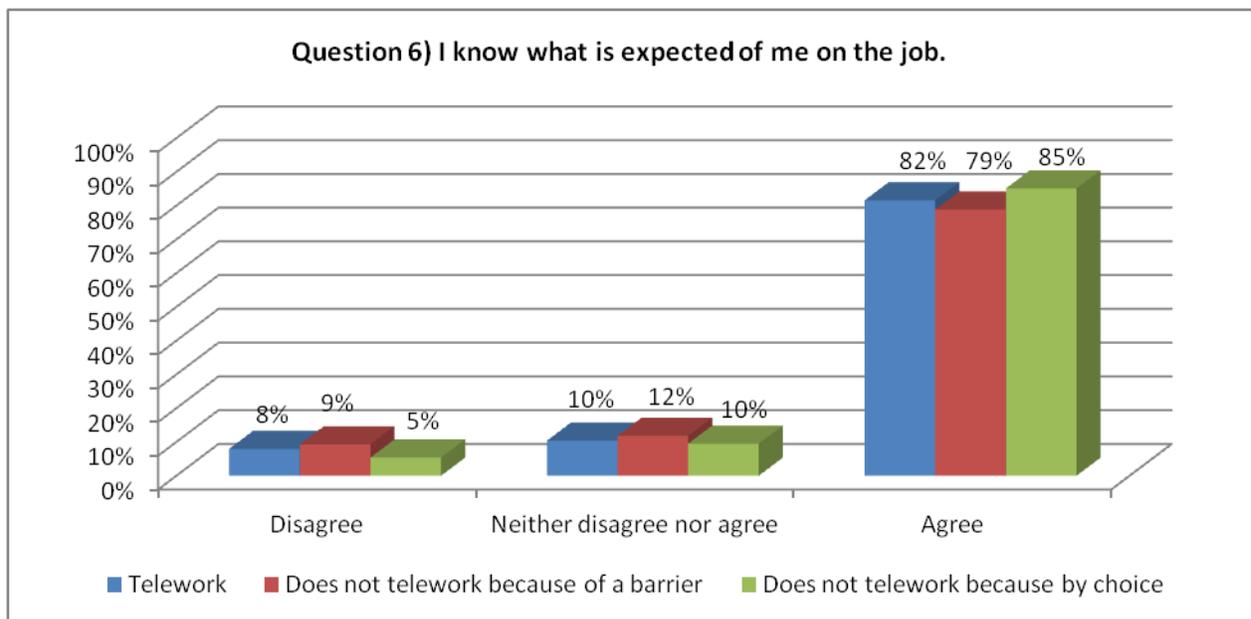
⁵ Results reported in this section should not be taken to indicate that telework causes the outcomes described. There are other characteristics of situation or employee (e.g., selection criteria for participation, motivation level) that might account for noted differences between teleworkers and non-teleworkers.

examined here. Both relate to aspects of effective performance management, including *clear work expectations* and a *focus on achieving results*. Note that in a comparison of findings reported from 2010 with 2011, results were either identical or so close as to be nearly identical. For that reason, 2010 results are not repeated here.

Overall, teleworkers indicate higher scores on items reflecting performance management principles than do those non-teleworkers who face barriers. Consequently, they may be better supported to perform their jobs with excellence than those who are not able to telework.

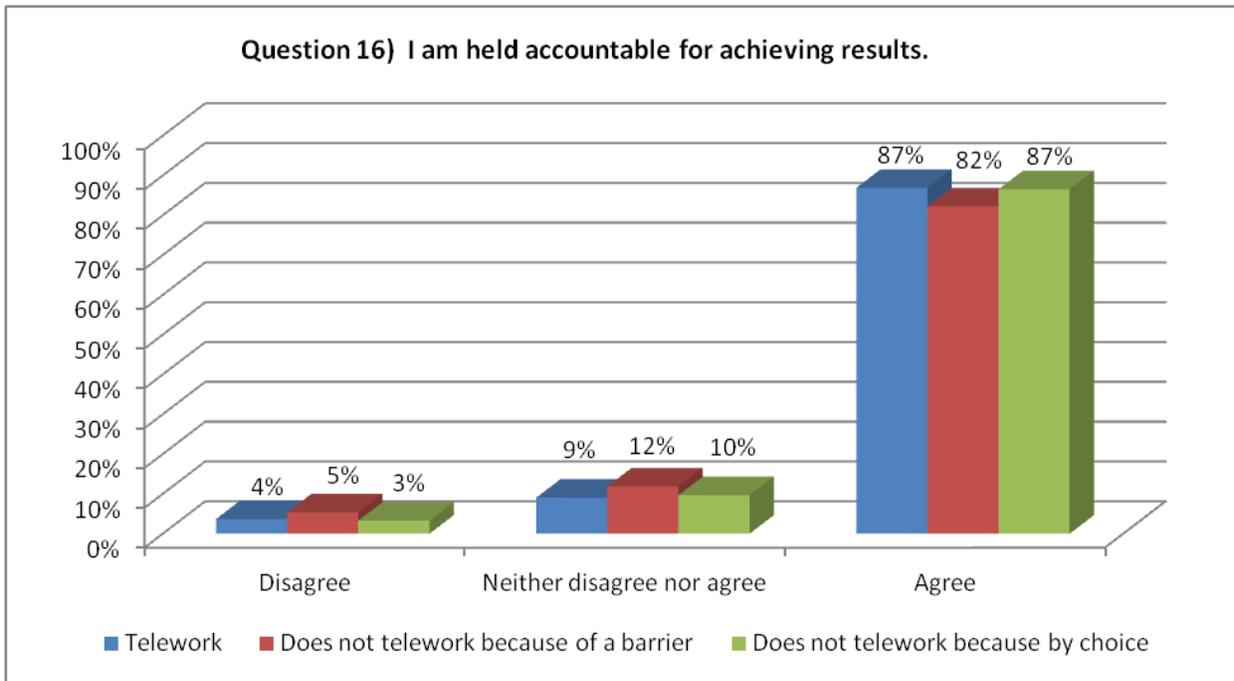
In responding to question number 6 of the FEVS, teleworkers (82%) were more likely to agree that they *know what is expected of them on the job* than non-teleworkers who faced a barrier to telework (79%). Among all FEVS respondents, 80 percent agreed or highly agreed with this statement.

Figure 12: Clear job expectations



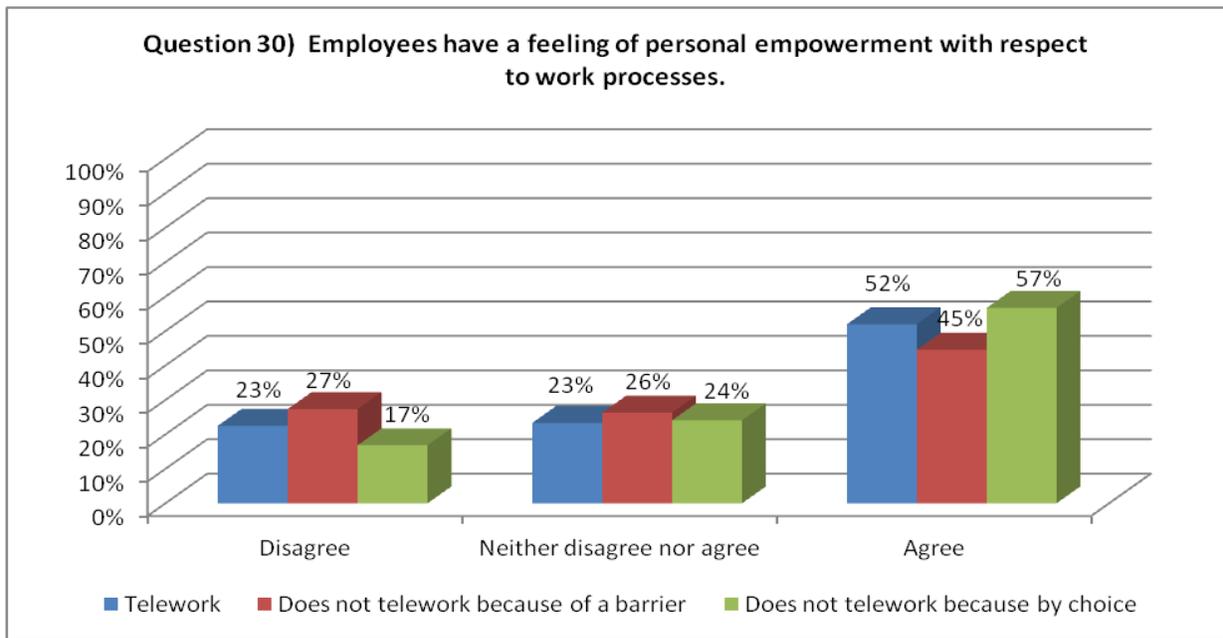
More teleworkers (87%) agree that they are held accountable for results than those who do not telework because of a barrier (82%). Eighty-four percent of respondents also either agreed or strongly agreed with the item.

Figure 13: Accountable for results



Finally, and related to performance management, teleworkers agree that they have a greater sense of control over work processes (52%) compared with those employees who do not telework as a result of barriers (45%).

Figure 14: Empowerment over work processes

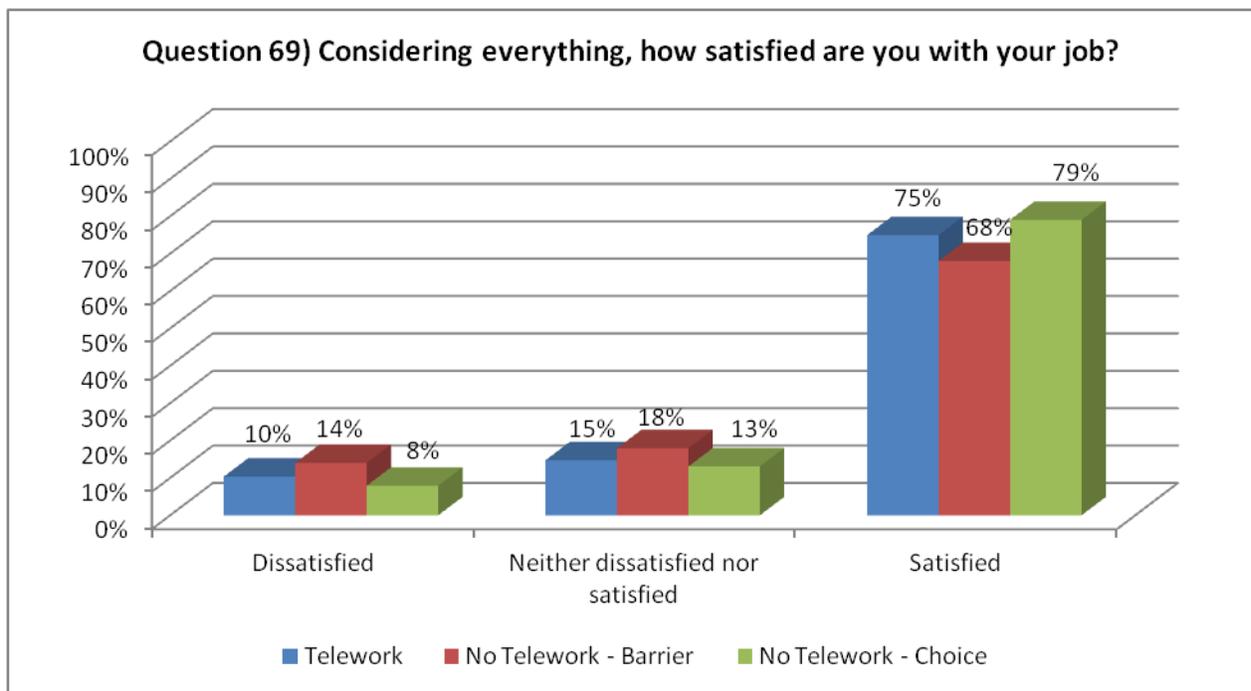


Employee Attitudes

In a review of telework research, Gajendran and Harrison (2007) show that participants in telework programs are more likely to exhibit job satisfaction and improved performance than non-teleworking coworkers. Employers care about job satisfaction because of the demonstrated link between satisfaction and employee turnover (a potential cost).

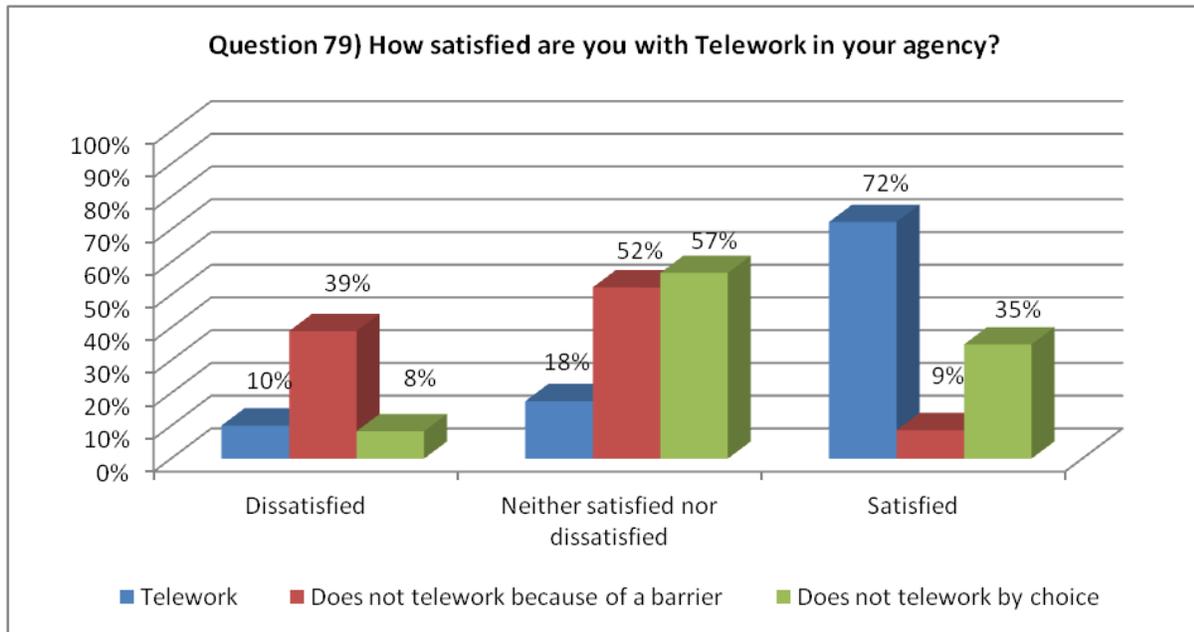
Analysis of the FEVS parallels findings in previous studies. Overall, 71 percent of Federal respondents to the 2011 FEVS reported being satisfied or very satisfied with their jobs. Figure 15 shows a remarkably larger percentage of teleworkers (75%) and non-teleworkers by choice (79%) report satisfaction with their jobs than those who are not able to telework (68%).

Figure 15: Job satisfaction



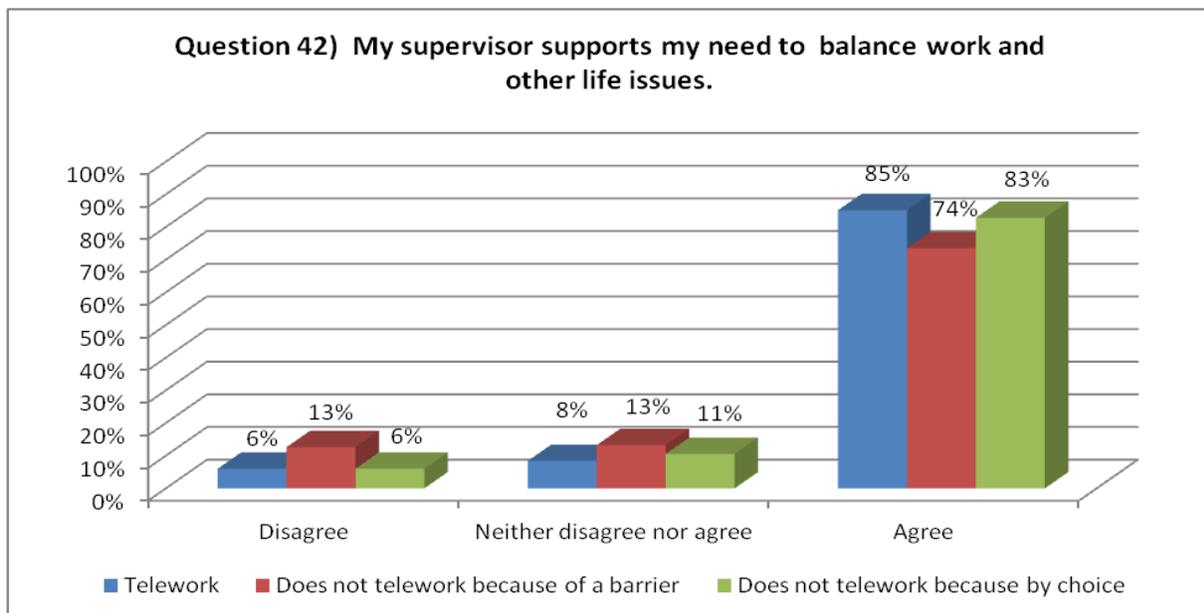
Expressed satisfaction with an agency telework program is an important outcome and an indicator of program success. An initial review of FEVS results suggested a disappointingly low rate of satisfaction with telework among Federal employees (38%). However, Figure 16 shows that such unfavorable perceptions are more likely to result when employees face barriers to program participation. Importantly, a far greater percentage of teleworkers report satisfaction (72%) when compared with those employees who were not able to telework because of barriers (9%) or simply chose not to telework (35%).

Figure 16: Satisfaction with agency telework



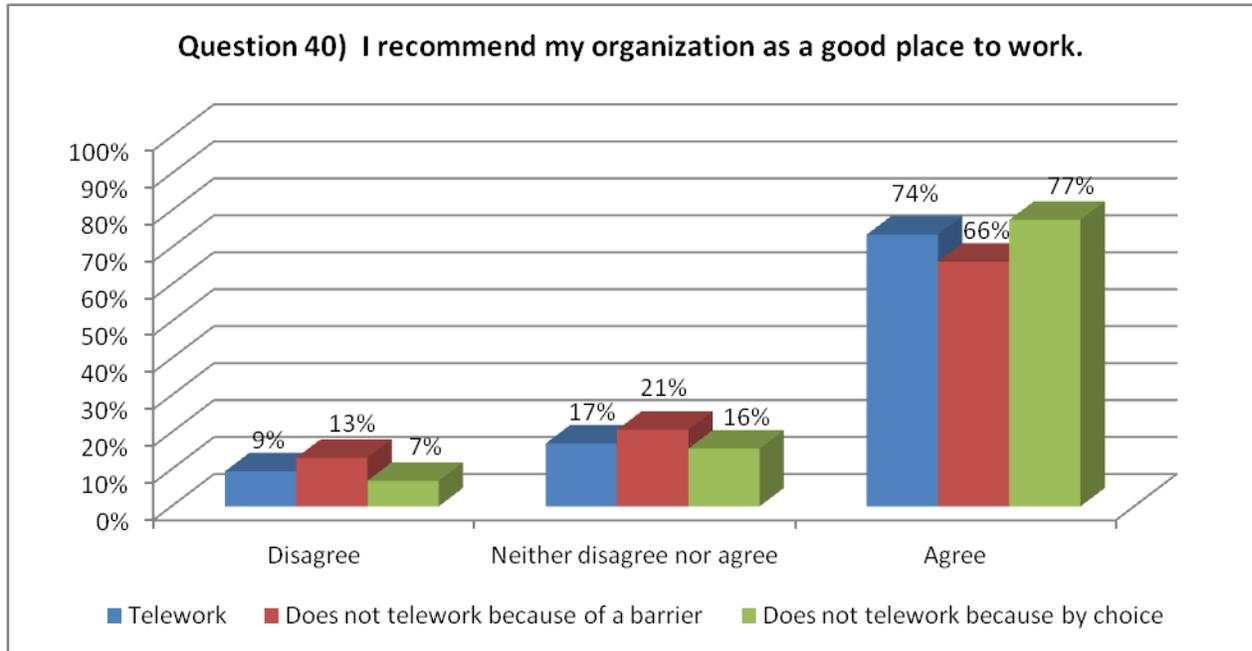
Work-life programs such as telework are often implemented to help employees manage the stress that can arise from conflicting work and life responsibilities (Bailey and Kurland, 2002). Employee perceptions of supervisors as supportive of needs to balance work with other life responsibilities may help relieve stress and lead to more positive work experiences. Figure 17 shows that more teleworkers perceive supervisors as supportive of their efforts to balance work with other life issues (85%) than employees not able to telework because of a barrier (74%).

Figure 17: Perception of supervisor support by telework participation



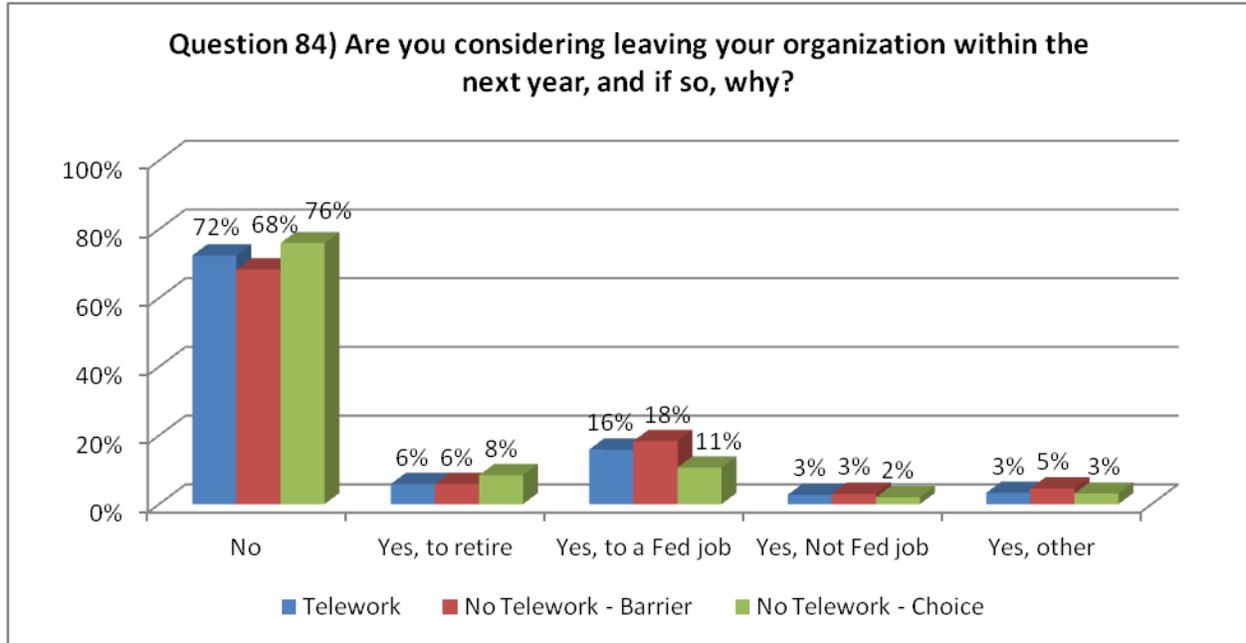
Among respondents to the 2011 FEVS, 69 percent agreed they would recommend their organization as a good place to work. Again, more teleworkers (74%) than employees who were prevented from telework (66%) agreed with this statement (Figure 18). This finding suggests a potential marketing value associated with telework programs, as happy teleworkers share positive impressions of their agencies with potential applicants.

Figure 18: Recommends organization



Finally, telework typically relates to employee retention, with teleworkers more likely to express an intention to remain with an employer (Gajendran & Harrison, 2007). Figure 19 parallels previous findings and shows that fewer FEVS teleworker respondents (72%) and non-teleworkers by choice (77%) expressed an intention to leave their current organizations as compared with those not able to telework because of a barrier (68%).

Figure 19: Turnover intent



Telework and Unintended Consequences

Employees may hesitate to telework and some managers fail to support participation in telework because of concerns regarding possible unintended negative consequences. In an extensive review of telework research, Bailey and Kurland (2002) reported the potential for social and career isolation as a possible negative unintended consequence of telework. Employee isolation can lead to reduced performance as described by Golden, Veiga and Dino (2008). Opportunities for meeting colleagues in passing are regarded as key opportunities for unplanned or serendipitous knowledge exchange. To the extent that telework reduces such opportunities, telework could potentially reduce overall knowledge sharing in workplaces (see Horan & Wells, 2005).

The FEVS includes items that allow exploration of these possible unintended negative consequences. Figures 20 to 23 compare teleworkers with respondents not able to telework on FEVS items that relate to employee development and knowledge sharing with encouraging results. Overall, a higher percentage of teleworkers (73%) than those not able to telework (61%) agree that they have access to skills development, while 65 percent of teleworkers agree that they have opportunities to put their talents to good use, compared with 57 percent of those unable to telework. Finally, more teleworkers (78%) perceive their colleagues as engaging in knowledge sharing when compared with respondents not able to telework (71%).

Figure 20: Opportunities for skills improvement by telework participation

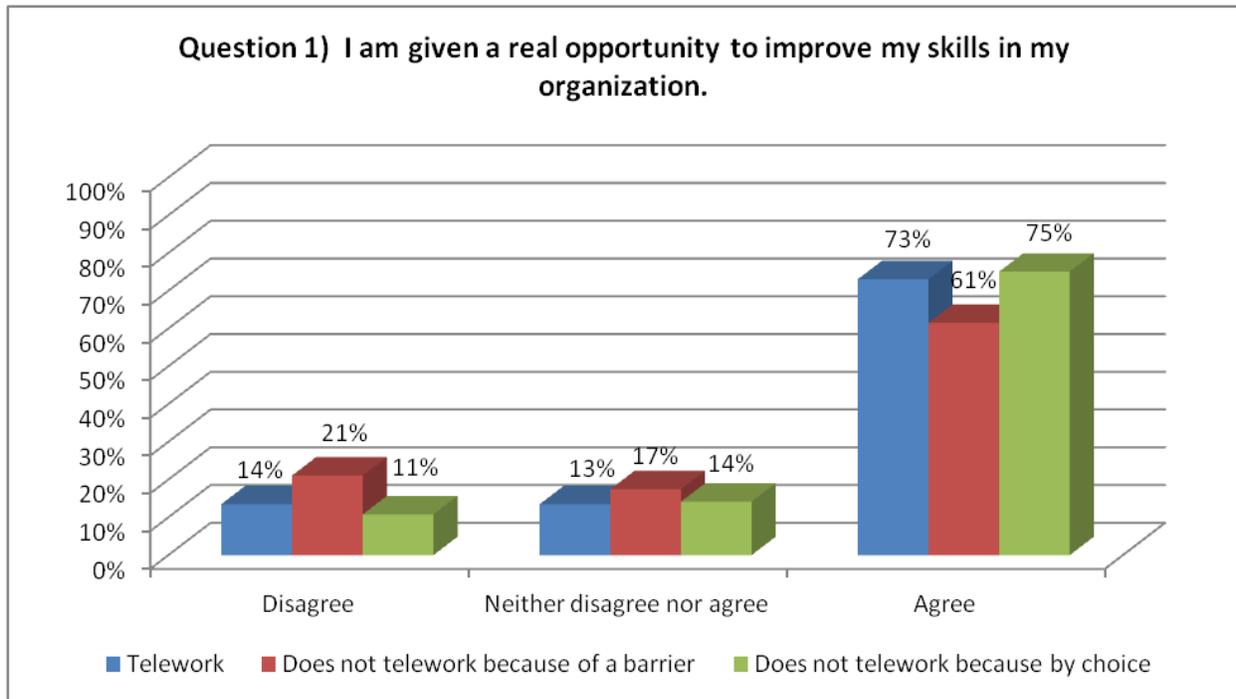


Figure 21: Strategic use of talents by telework participation

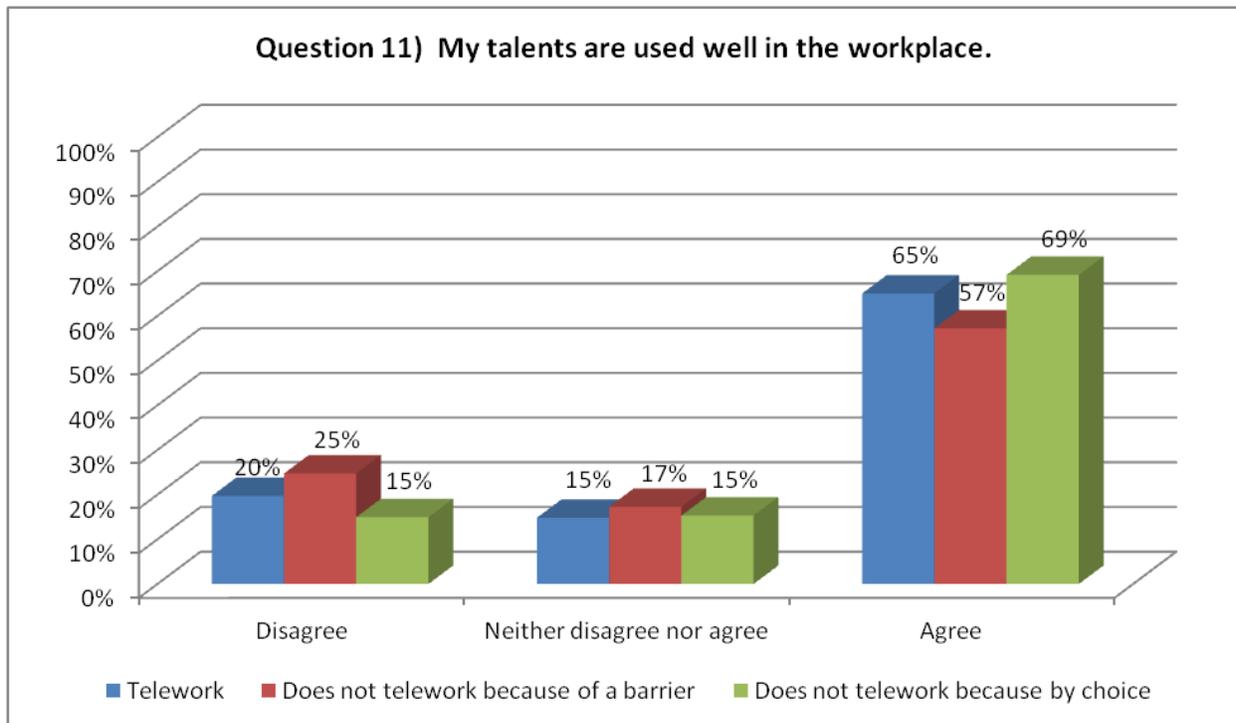
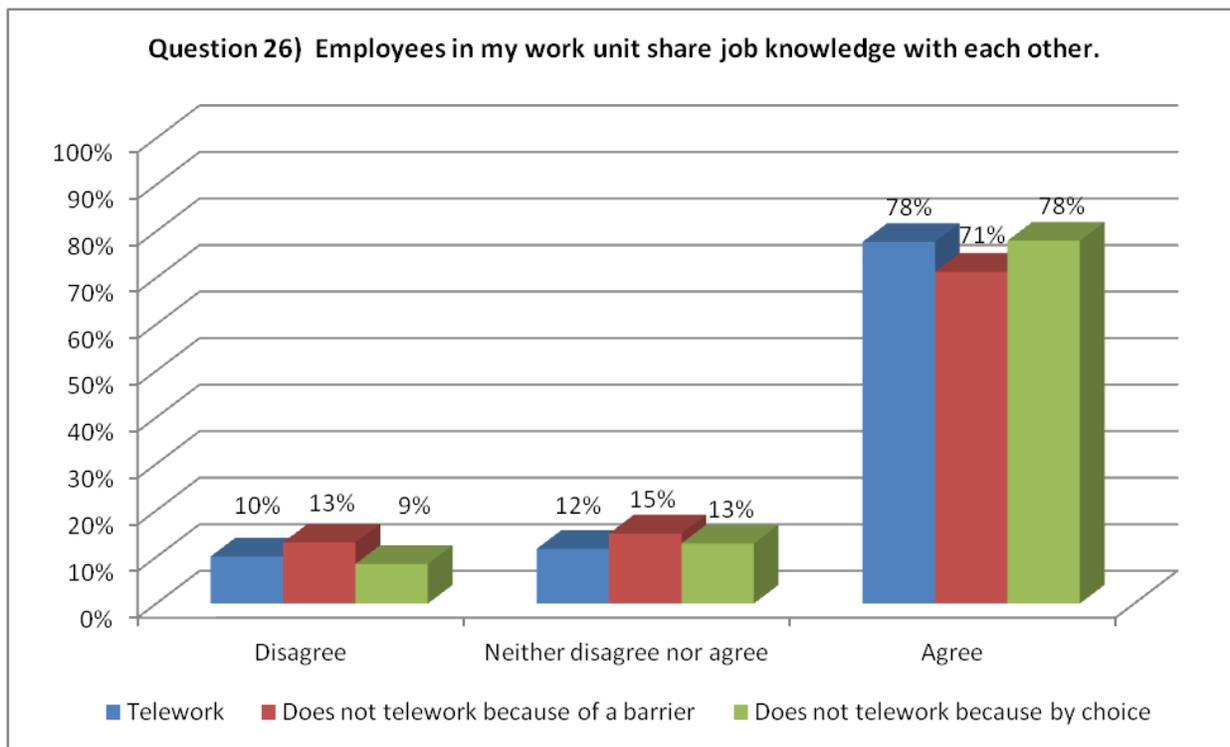


Figure 22: Perceptions of knowledge sharing by telework participation



Goal Setting: The Agency Perspective

The Telework Enhancement Act of 2010 requires that agencies report an annual telework participation goal and encourages agencies to set and measure progress towards a variety of other goals. Once established in 2012, agencies are required to make an annual assessment of progress towards meeting participation rate goals and explain whether they have met their goals. In cases where agencies do not meet goals, they must detail actions to be taken to “identify and eliminate barriers to maximizing telework opportunities for the next reporting period” [Public Law 111-292, 6506(b)(2)(E)].

Since this is the first reporting year under the new law, the participation goals provided this year will be a baseline upon which agencies will assess their progress in the 2013 Report to Congress. Not all agencies had completed the process of updating their telework policies as of the data collection period. Consequently, not every agency was able to set a participation goal for this report.

Participation Rate Goals

Of responding agencies, 41 reported a participation goal as either a percentage or number of employees. Some agencies chose to report a percentage of total employees whereas others reported a percentage of eligible employees or a percentage increase over the past year’s participation rate. One agency felt comfortable staying at its present level of participation and two agencies reported 100 percent participation.

For a variety of reasons, some agencies were either not ready or unable to specify a participation goal. First, since the Act took effect in December 2010 and agencies were not required to notify employees of eligibility until June 2011, many agencies were still in the process of setting and finalizing their policies at the time of the Call. In such cases, agencies avoided prematurely setting a participation rate goal before their new policies took full effect. Additionally, setting a participation rate goal requires the ability to accurately count the number of teleworkers. Since a number of agencies are still struggling with measurement, some agencies may be unable to set a goal at this time.

In total, 27 agencies did not report a participation rate goal. Additionally, 19 agencies declined to give a goal in terms of percentage or number of employees, and gave descriptive responses instead. These other responses included: (1) explanations for why a goal has not been set, (2) aspirational goals, (3) goals to be achieved for number of employees with telework agreements, and (4) the desire to remain at current levels of participation. Full responses can be found in Appendix 7.

Other Goals

The Telework Enhancement Act also encourages, but does not require, agencies to set and assess progress towards meeting other goals through telework – such as emergency preparedness, energy use, recruitment, retention, performance, and productivity. In this year’s Call, several new items measured how many agencies have set non-participation goals. The results can be found in Table 22. Analyzing how agencies have begun to measure goal attainment will provide evidence useful for identifying best practices.

Given the emphasis placed on agency continuity of operations (COOP) in the Act, it is encouraging to see that emergency preparedness goals were the most frequently mentioned. Telework has been promoted across the Federal Government as a way to maintain operations during emergency situations and the Call confirms that many agencies have included telework as part of COOP and pandemic influenza plans.

Less commonly reported goals include reductions in commuter miles, energy use, and agency real estate costs, as well as improved employee performance. Based on the results of qualitative data collected in the Call, it appears that agencies are facing challenges when measuring these goals. The lack of readily available data and the difficulty of measuring these outcomes may be dissuading more agencies from focusing attention here.

Agencies reported goals paralleling commonly reported benefits of telework in the academic literature, including improved employee attitudes and recruitment and retention. Again, ease of measurement may also play a role. A number of tools already exist for measuring these outcomes including the FEVS, internal job satisfaction surveys, and new employee and exit surveys.

Table 22: Agency goals for telework

Outcome Goals	Yes	No	Number of Responding Agencies
Emergency preparedness	72	8	80
Improved employee attitudes	58	22	80
Employee recruitment	53	27	80
Employee retention	52	28	80
Reduced commuter miles	45	34	79
Improved employee performance	34	46	80
Reduced energy use	26	54	80
Reduced or avoided real estate costs	25	55	80

Table 23 summarizes the responses to a question regarding agencies' realized cost savings. For 29 agencies, cost savings estimates are still in the planning stages, and 15 agencies either do not track this information or have no reported savings. This provides further evidence that estimating savings and measuring outcomes remain a work in progress. Still, several agencies did report fewer absences and reduced space needs, utility bills, and transportation subsidy expenditures.

Table 23: Agency cost savings

Realized Cost Savings	Number of agencies
Planning is underway for assessing cost savings	30
Reduced employee absences	15
Human capital (e.g., recruitment, retention)	10
Rent, office space	6
Utilities	4
Reduced transportation subsidy	4
Training	0
Other	23
N/A or no savings tracked	15

Measuring Outcomes: The Agency Perspective

The following sections summarize how agencies have measured outcomes so far and highlight best practices for advancing telework in Federal agencies. At this early stage of the implementation process, agencies have been revamping their policies, working to expand access to telework, setting goals, and building their telework staffs. Agencies vary tremendously in size, personnel and resource availability, as well as how far along they are in the implementation phase of program development. As a result, measuring telework program outcomes remains a work in progress, and it is too soon to clearly establish any particular practice as “best.” Yet, from the 2012 Call we found evidence of innovative methods of measuring progress towards meeting goals.

Recruitment

Multiple agencies include telework in job announcements. Several have plans to conduct internal surveys and focus groups of new employees to determine telework’s impact on their decision to join the agency. Others mentioned using existing data sources such as the FEVS and other large scale surveys, while several agencies also reported that they do not know how to or do not currently have plans to measure this outcome.

- *U.S. Patent and Trademark Office: Patent examiners participating in a full-time telework program have a lower attrition rate (3 percent lower in FY2010) than the patent examiners not on a full-time telework program.*
- *National Transportation Safety Board: The agency hired back an employee by allowing him to telework full-time while finishing a graduate degree out-of-state.*

Retention

Agencies reported using exit surveys, internal satisfaction surveys, internal focus groups, the FEVS, and anecdotal evidence to measure retention.

- *National Transportation Safety Board: The agency has been able to retain several employees in mission-critical positions that are difficult to backfill, who have relocated to other states for personal reasons by allowing them to telework on a full-time schedule.*
- *Farm Credit System Insurance Corporation (FCSIC): The FCSIC currently has one employee teleworking on a short-term basis due to a medical condition. Had this employee not been permitted to telework, she might have retired earlier than planned.*
- *PTO: The Trademark organization began its hoteling initiative in 2002, with the Trademark Work at Home (TWAH) hoteling program for Trademark examining attorneys. For the five years prior to the program, Trademarks had an average resignation rate of 9.62 percent. From 2006 to 2010, the most recent five years since the incorporation of the TWAH hoteling program, the average resignation rate was 3.03 percent. In a Trademark perception survey, 90 percent of hoteling respondents indicated the TWAH program has influenced them to stay.*

Improved employee performance

Fewer methods of measurement were reported for this outcome, indicating that agencies are still considering ways to measure performance. A few agencies stated that telework requires a certain performance rating, acting as an incentive to increase performance either to maintain or gain access to telework. Others cited the FEVS, internal management surveys, employee satisfaction surveys, and focus groups as methods of progress towards this goal.

- *Defense Nuclear Facilities Safety Board (DNFSB): In the Board's internal telework survey, employees indicated they were more productive on the days they teleworked due to fewer interruptions and they tended to work longer because they did not have to spend time commuting. Employees must be rated at least "Fully Successful" to telework; employees who want to continue to telework are motivated to maintain good performance.*
- *Federal Deposit Insurance Corporation (FDIC): The Telework Survey revealed that over 70 percent of our managers agree that teleworkers' productivity increases or remains the same, and 80 percent of employees believe teleworking increases their productivity.*
- *PTO: In Fiscal Years 2009 and 2010, examiners participating in the Patent Hoteling Telework Program (PHP) worked, on average, approximately 14 more examination hours, including overtime, per year than non-PHP examiners. With the average PHP examiner having more examination hours than a non-PHP examiner, the resulting gain in productivity is approximately 5.7 full-time equivalents (FTEs,) which are the same as approximately six additional patent examiners working for a full year.*

Improved employee attitudes/job satisfaction

Agencies most frequently reported comparing the results of the FEVS on employee attitude measures year- to -year. A few agencies mentioned their own internal employee satisfaction surveys, focus groups, and exit surveys.

- *DNFSB: Prior to the 2011 FEVS, employee satisfaction with the Board's telework program was extremely low. To address this problem, in the fall of 2010, management directed that core telework be piloted in the spring of 2011. Employee satisfaction with telework increased from 7.9 percent in 2010 to 55.3 percent in 2011.*
- *National Transportation Safety Board (NTSB): From the 2011 FEVS, 80.8 percent employees were either very satisfied or satisfied with the telework program, a 26.6 percent increase over the last few years.*

Emergency preparedness

Many agencies described the role of telework in their emergency planning (e.g., as part of COOP, pandemic plans, encouraging unscheduled telework). Only a few described measurements for assessing this as an outcome. Common methods included tracking periodic

exercises or tests, measuring numbers of log-ins to agency systems during tests or emergencies, and examining time and attendance records during emergencies. One agency used increases in telework agreements as evidence of emergency planning success.

- *PTO: The existing telework program provides PTO with the ability to continue some everyday business operations during an emergency beyond those defined in the COOP plan. For example, during the February 2010, snowstorm closure, the Trademark Assistance Center continued to answer public inquiries with 91 percent answered in 20 seconds, which was better than the average performance for the previous quarter. The Trademark examining corps accomplished 85 percent of the production that they did in the same four days of the prior week even though the rest of the Government was shut down. Without telework and hoteling, the agency would have been completely unproductive during this time. In addition, while the Federal Government was closed for four full days, patent examining time was only down about 19 percent for the bi-week. The variety of flex work schedule programs and telework likely contributed to the PTO not losing closer to the full 40 percent patent examining time potentially lost during the four days of Government closures.*
- *Overseas Private Investment Corporation (OPIC): We plan to measure the use of telework for emergency preparedness through reports using NotiFind, WebTA (web-based time and attendance system), and/or our payroll provider's reporting center (Datamart).*

Reduced energy costs

Only three agencies (PTO, Farm Credit Administration, and National Council on Disability) reported measuring energy costs (via avoided office space needs). Agencies cited barriers to measurement, such as leasing their buildings or not having direct access to or control of their utility use data. A few have established working groups to study this and others cited energy use reductions as part of broader sustainability plans, but provided no metrics for measuring reductions.

- *PTO: Given that we would have had to lease 1/3 of the campus – 2 more buildings (approximately 776,000 RSF) – were it not for Telework, we would likely have spent an additional \$2,401,933 annually for electricity costs (based on the campus total for FY2011 Q3).*

Avoided real estate costs

Several agencies described eliminating some office space as a result of telework, but few were able to translate this into dollar figures or square-footage of space saved. Several had established working groups to study real estate cost measurement. Several agencies were making strategic use of hoteling, office sharing, and unique floor designs to save space.

- *Department of Agriculture: Plans are underway to capture and collect data on individual eligibility as well as unique facility location identifier in an automated fashion. This*

capability will enable the Department to track and capture data on underutilized facilities that may house employees who are, in large part, able to telework. This data will enable the Department to make strategic decisions on closures or consolidation of office space based on the ability to increase telework.

- *Department of Commerce: The agency is working to reduce space through a three part strategy: 1) identify consolidation opportunities; 2) look for reduction savings in expiring leases before new contracts are made; and 3) review all planned and existing leases for savings as well as eliminating any excess or underutilized owned space. Reduction savings can come from implementing three day or more per week telework, reducing space through open floor design, reduction of support space, and setting workstation size standard.*
- *Department of Labor: The agency has been aggressively reducing its real estate requirements by reducing the work space footprint of individual workers and requiring that new space is built in a ration of 80 percent workstations and 20 percent private offices. "Hoteling" also is encouraged. The agency also seeks to consolidate bureau populations (minimizing travel time between office functions), and by providing more open, collaborative office designs. Lastly, a lease replacement/consolidation prospectus is being prepared that, if approved and developed, will make substantial use of hoteling and similar practices.*
- *General Services Administration: The agency uses space reconfiguration to provide enhanced hot-desking, hoteling, and desk sharing options.*

Reduced commuter miles

Several agencies reporting that transportation subsidy costs decreased as a result of telework. A few reported collecting or planning to collect data from employees, without specifying which data they would collect. The Office of the U.S. Trade Representative calculates commuter miles saved and compares year to year. The Department of State tracks miles saved by teleworkers using an online application that employees complete. The National Council on Disability reduced parking facility need. The U.S. Commission on Civil Rights estimated commute miles saved from the number of full telework days.

- *PTO: PTO fourth quarter FY 2011 telework data indicates that 2,322 employees teleworking five days per week translates to 28,647,675 miles reduced in a year and 15,040 tons of emissions reduced in a year. 1,142 employees teleworking four days per week translates to 11,271,540 commuter miles reduced in a year and 5,918 tons of emissions reduced in a year.*
- *Department of Transportation (DOT): DOT is working to develop a "commute days avoided" metric, which will be comprised of a calculation of employees' telework hours recorded in a time & attendance system and employees' regular days off (RDO).*

Goals and Outcomes: The Societal Perspective

In addition to individual employee and agency outcomes, telework is often implemented as a means for achieving broader societal goals, as shown in the logic model (pictured above in

Figure 1). For example, using certain telework program designs, large-scale participation in telework could contribute to energy use reduction, pollution control, and traffic congestion relief. Offering telework as a workplace flexibility could also result in increased job availability.

The Telework Enhancement Act of 2010 tasked OPM with researching “the utilization of telework by public and private sector entities that identify best practices and recommendations for the Federal Government” and reviewing “the outcomes associated with an increase in telework, including the effects of telework on energy consumption, job creation and availability, urban transportation patterns, and the ability to anticipate the dispersal of work during periods of emergency.” See the Telework Enhancement Act of 2010, Pub. L. 111-292 (Dec. 9, 2010) at section 4. Congress requested that such studies or reviews be made available to the public.

In 2011, two literature reviews were compiled by OPM researchers. They respond to the Act by summarizing research that addresses private sector practices in telework and telework as a tool for reducing energy use and environmental impacts, alleviating traffic congestion, and increasing job opportunities (See Appendix 2 for complete contents).

Evidence from the review of the literature suggests that agencies with energy, transportation and job availability goals should consider the following program design elements, when appropriate, in order to maximize telework’s impact on broad social outcomes.

Telework, Energy, Transportation, and the Environment

- Maximize hoteling where possible in order to decrease office space.
- Encourage teleworking for those with the longest commutes.
- Be aware of potential home energy use increases and potential cost transfer to employees
- Consider pollution and emissions differences between home and office mix of energy sources.
- Develop a variety of telework arrangements that can be flexibly applied, such as combining telework with other flexible schedules.
- Use information and communication technology effectively.
- Educate teleworkers about how to save energy while teleworking.

Increasing Job Availability through Telework

- Identify and consider how to address strategic agency needs through expanded opportunities for telework (e.g., retention of knowledgeable employees nearing retirement).
- Encourage the use of telework as a recruiting and retention tool for highly sought after employees
- Increase awareness of existing opportunities to telework through recruitment efforts.

The extended contents of the literature reviews can be found in Appendix 2. On these and other societal level telework goals, future research is needed within Government and in the broader research community in order to gain clarity on the potential impact of telework on society.

CONCLUSION AND NEXT STEPS

To conclude the 2012 Telework Status Report, results overall provide evidence of remarkable efforts on the part of agencies as they have worked to adjust telework practice to align with the Telework Enhancement Act. Agencies, overall, have made tremendous strides to address and satisfy mandated requirements, and results reported from multiple data collection efforts suggest that the major work of implementing programs has been addressed. Federal telework is being transformed into the strategic management tool that many in the telework community have long envisioned.

In terms of next steps, agencies will continue to develop and advance telework programs. As described in the beginning of the report, OPM will continue to actively consult with agencies to assist in such endeavors. Realizing the true potential of telework requires integrating telework programs into the business of agencies, ensuring alignment with agency mission and work. Integration at this level places telework squarely in the realm of organizational change. Evaluation is key to any successful program of change, and OPM will carry on its work with agencies to help them to develop internal change and evaluation capacities through continued training in measurement, goal-setting, and action planning.

Effective program development requires continuous evaluation and feedback. Accurate and useful evaluations, in turn, rely upon valid and reliable sources of data. As mentioned throughout the report, agency practices and data collection methods vary too widely to provide reliable data. To ensure that ongoing agency and Governmentwide evaluations are informed by data of the highest quality, as well as to reduce the manual reporting burden for agencies, OPM will continue to work with the Federal Shared Service Centers and agencies to automate the collection of telework data via the Enterprise Human Resources Integration (EHRI) HR and Payroll data feeds. An employee's telework eligibility and usage will be collected, summarized and reported to OPM via the monthly EHRI HR-Status data feed and bi-weekly EHRI payroll data feed. OPM will be able to analyze these data to explore links between telework and important agency outcomes, especially factors related to productivity and cost (e.g., leave use).

The work of establishing a Governmentwide automated telework data collection system is currently underway. OPM recently released new standards for the telework data to be collected via EHRI. In addition, an updated version of the Governmentwide reporting requirements contained in the Guide to Human Resources Reporting (GHRR) was recently published. OPM will begin collecting pilot data in late summer and begin the work of establishing data reliability and validity through standard professional tests of data during the fall of 2012. OPM will also continue to work with both the Shared Service Centers and Agency

Telework Managing Officers to ensure a thorough understanding of the reporting requirements.

Development of robust programs and the successful advancement of telework also depend upon interagency learning and sharing of best practices. To that end, OPM will continue to hold interagency meetings and learning forums. Work/Life/Wellness staff will also investigate ways to leverage the many opportunities afforded by technology to facilitate interagency learning, including Communities of Practice.

The focus groups held for this report provided a wonderful opportunity to include the voice of agency experience in the annual status report to Congress. They also provide important insights useful for understanding the current state of telework program development and current practices in Federal telework. While it is too early at this implementation stage to identify practices that might prove to be “best,” focus group findings do outline a number of promising practices for advancing Federal telework. Moreover, focus group comments are thought-provoking and should prove useful in fostering interagency learning as agencies work to improve programs. For these reasons, and by way of closing the report, practice recommendations from agency focus groups are reproduced here (for the full report, see Appendix 1):

Lessons Learned

Gain Leadership Buy-In

Several participants agreed that gaining buy-in from leadership members at all levels is key to a successful telework program. Comments indicate that gaining leadership support can truly be the catalyst for effective implementation, and buy-in occurs when managers try it for themselves.

Involve Critical Functions

The importance of partnering early and often with union representatives and IT experts within agencies was mentioned as particularly instrumental to the success of telework programs. Involvement of all critical parties and functions will limit the number of unexpected surprises and is important for ensuring the effective collaborations necessary for long-term success.

Institute Reliable Data Collection

Participants also commented that instituting a reliable data collection or tracking procedure is critical to demonstrating telework success and as a tool for long-range planning and managing for program effectiveness. One participant commented, “As a whole, we need to have a better system for tracking telework. Providing data for the OPM Data Call is difficult for many who have to manually track telework participation.

Governmentwide, we need to make it easier to collect and report data.” Other participants noted that online application systems need to be comprehensive before going live to ensure seamless application. This is another area where partnership with IT and security experts is crucial.

Standardize Eligibility and Participation Criteria

Participants described the importance of standardizing eligibility decisions and notification. Some agencies notify their employees via mass email and/or during new employee orientation, while others prefer managers to send individual emails. Participants agreed that part of increasing trust in the telework process is to make sure that communications and notifications are handled fairly and according to established standards across an agency.

Measure Performance Accurately

Agencies reported facing challenges of performance management in advancing their telework program. Participants stressed the need for performance management systems to measure the outcome of completed tasks and goals. They agreed "managers want to know exactly what teleworkers are working on when out of the office". It is critical for performance management systems to directly link to agency-wide performance plans.

Be Patient

Lastly, several participants emphasized the importance of remaining aware that change takes time and progress with telework requires patience. One participant suggested that one way to address this is to make sure that telework goals and objectives are clear and shared across an agency and that information about progress toward those goals is also shared on an ongoing basis.

Appendix 1: Focus Group Report

2011 Telework Focus Groups: Summary of Results

Introduction

In recent years, both Congress and the executive branch have increasingly promoted telework to help achieve important public policy goals. Most recently, agencies have worked hard to comply with the requirements of the Telework Enhancement Act (Public Law 111-292) (the Act), which was signed into law in December 2010. To address the Act's requirements, some agencies have built new programs; others have extensively transformed agency telework, while others have revitalized existing programs. Understanding these current practices is an important first step toward identifying "best practices" and the development of robust telework programs across the Federal government.

The U.S. Office of Personnel Management's (OPM) Work/Life/Wellness (W/L/W) Office is responsible for supporting Federal agencies in implementing and managing effective telework programs. Among other responsibilities, OPM provides telework policy guidance to agencies, assists agencies in defining and establishing appropriate telework measures and goals, assesses agency progress in telework program development, and conducts research on critical issues relevant to the application of telework practices and procedures. OPM's W/L/W Office conducted focus groups for at least two reasons. First and foremost, in support of W/L/W consultative efforts with agencies, we sought to gain an understanding of the general environment for telework in agencies through group discussion. Our second intention was to gain a systematic perspective on the successes and challenges agencies may have encountered as a result of the Act. In fact, in every focus group discussion, agency efforts to address Act requirements figured as a constant reference point for participants. Even questions probing more general aspects of telework tended to elicit responses that referenced the Act, demonstrating its influence on participant perspectives.

Overall, the integrated focus group results presented in this report provide insights into what has worked well for agencies in terms of telework implementation, what the Act has caused agencies to focus on, and what has been challenging for agencies as Telework Managing Officers (TMOs)⁶ and coordinators seek to better manage their telework programs. Individual names of agencies will not be discussed as stated in the focus group protocol for each session. This measure was adopted in order to encourage participants to speak freely.

⁶ Telework Managing Officers were established in the Act and are part of the "Office of the Chief Human Capital Officer or comparable office with similar functions." The TMO is "devoted to policy development and implementation related to telework programs." Further, he or she serves "as an advisor for agency leadership...a resource for managers and employees, and a primary agency point of contact for the Office of Personnel Management on telework matters..."

The organization of this report follows the same order as the questions and topics actually used to guide the focus groups (see Appendix A for the structured questions used in all focus groups). It begins with more general aspects of telework and proceeds through topics related to Act implementation. Report sections provide an overview of top-ranking responses to structured questions in the protocol. Notable quotes outlined in each section illustrate agency perspectives and provide detailed insights into Federal telework. The report ends by outlining lessons learned shared by participants.

Methodology

In September 2011, the W/L/W staff conducted four focus groups with agency representatives to learn more about how telework programs are being implemented and managed across the Federal Government. Two groups were conducted with agency TMOs, and two groups were held with telework coordinators. Participants were chosen at random. Thirteen agencies were represented in the coordinator focus groups, and eight agencies were represented in the TMO focus groups. All groups met for approximately two hours. During the focus groups, W/L/W researchers facilitated discussion by leading participants through a series of structured questions. The questioning route was developed with reference to telework survey results, existing telework literature (Kurland and Bailey 2000, Nassar-McMillan and Borders 2002), and the Telework Enhancement Act. Two W/L/W researchers conducted each focus group; one served as the focus group facilitator and the other recorded focus group comments using a laptop computer. Focus group size ranged from four to eight participants.

Focus group data were analyzed in accord with the method outlined by qualitative data analysis experts, Miles and Huberman (1994). The procedure began with a thorough review of the notes obtained by the recorder of each session. The results of the TMO and coordinator focus groups were maintained in separate files for organizational purposes and analysis. Recurring themes were identified through a detailed review of focus group notes by individual researchers. Themes were identified by teams of independent reviewers and confirmed by comparison of results from pairs of researchers. Points of divergence were discussed for the final identification of key themes. Themes identified across all groups are reported below.

What Works Well

Focus group discussions began on a positive note by asking participants to describe what was going well in telework programs. The focus groups were held in September, just as TMOs and coordinators were winding down a huge effort to satisfy Act requirements. Satisfying requirements meant revising policies, determining employee eligibility to participate in telework, and considering aspects of program implementation such as teleworker training. Not surprisingly, such topics were foremost in the minds of TMOs and coordinators and, consequently, heavily considered in participant descriptions of what was going well in their telework programs.

It is encouraging to note that the efforts agencies were required to make in response to the Act were mentioned prominently as areas of success. In fact, as a result of the Act, participants reported that more managers and their direct reports recognize the benefit of telework. In

testifying to the heightened attention to telework since the enactment of the Telework Enhancement Act, one participant commented, “The Act helped us to get a better picture of what’s actually going on and to be able to explain telework a bit more. It gave us the spotlight for a little while.”

Themes described next reveal both common experiences and experiences that were unique to respective agencies. Therefore, even topics that were popular and addressed by several agencies show small percentages in final results.

Of the 21 total participants,

- 5 participants (24%) commented that training has gone well,
- 4 participants (19%) reported that leadership support has been a factor that has worked well in their telework programs,
- 6 participants (29%) noted that communication has gone well, and
- 3 participants (14%) shared that telework policies and procedures have been an area of strength.

Please see Figure 1 for a graphical representation of the focus group results regarding what has worked well for agencies as they develop telework programs.

Training

Effective training also proved to be an important consideration for program success and is a program aspect a number of participants defined as going well. A common concern among leadership was the ability to manage teleworkers. In order to decrease these concerns, agencies provided training for managers. These exercises have helped capture telework endorsements by managers. Training for teleworkers also was highlighted as a successful component of agency telework programs. Participants recalled the use of training support and materials provided by OPM on telework.gov. Other agencies developed their own training programs in the form of classes and workshops to provide new teleworkers the opportunity to address potential challenges. For example, one participant related, “my agency developed its own training. Our top leader assumes training should help advance telework, and encourage support from managers. Also, the training should help employees to really understand how to better telework.”

Leadership and Other Supports

Participants expressed the importance of obtaining manager and executive buy-in. Some participants reported that they were able to obtain buy-in by encouraging leadership to think positively and creatively about which positions are appropriate to telework, particularly those positions that may not have been considered eligible in the past. One focus group participant shared the impact of a top leader’s demonstration of support by stating, “I don’t know how comfortable our top leader is on a personal level, but he/she saw to it that all members of

his/her staff would get telework agreements in place and that had a big effect. It said 'we're on board.' He/she doesn't give many speeches on it, but this act led by example." This participant's comment testifies to the importance of leaders pushing beyond their personal feelings about telework and leading by example.

In terms of practical concerns, agencies have paid a great amount of attention to the importance of establishing strong technological capabilities to support effective telework programs. Many participants expressed the importance of ensuring that information technology infrastructures are well equipped and discussed the efforts being made in their agencies to ensure appropriate infrastructure. Some agencies described telework drills that allow them to identify any technology-related issues such as user inexperience and technology configuration.

Communication

Technology, training, and leadership support have influenced the success of communication in telework programs. Teleworkers stay connected with their managers and in-office counterparts by use of email, phone, instant message, and voicemail. Several agencies believe that use of these technologies has supported interaction between employees and is therefore a point of success in programs.

Another aspect of communication mentioned as going well in programs is the type of messages that agencies have shared to promote telework. One participant commented, "One thing we did differently was to sell telework to managers as a productivity tool. We said work-life balance is icing on the cake, but the key thing is how to make this a productivity tool and that seemed to help more hesitant managers who thought this was soft stuff only pertaining to women having babies. It made them realize, no, this is about productivity."

Participants also described the kinds of messages communicated within the agencies and their importance to trust, a key competency in successful telework. Participants agreed that it is important to communicate a sense of trust between top leaders, supervisors, and teleworkers. One agency instituted a campaign to promote the importance of trust by posting and distributing flyers with the message "Work plus Trust equals Teletrust" across the agency. Participants agreed that the same amount of trust extended toward office-bound employees to effectively manage their work responsibilities must be extended toward teleworkers. Messages indicating the equitable extension of trust are critical to the establishment of an effective telework program.

Revision of Policies and Procedures

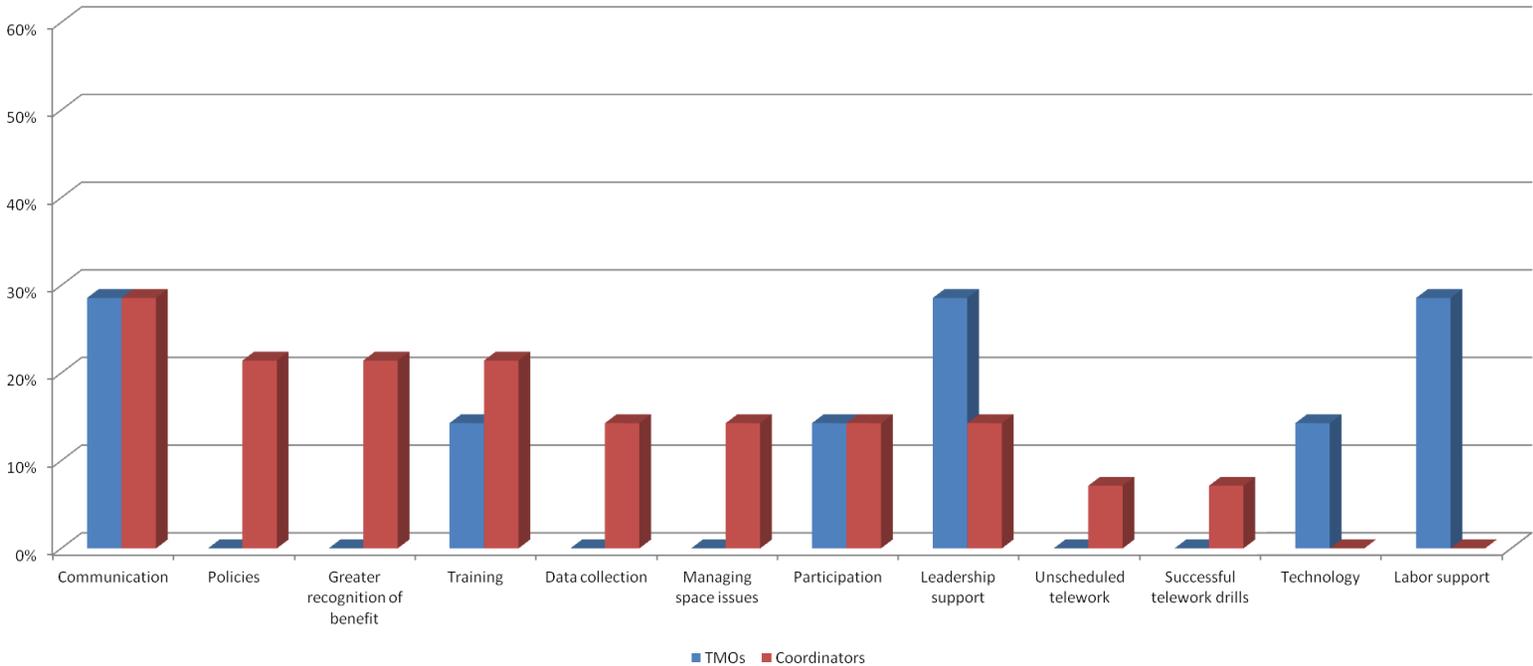
Multiple participants commented that revisions have been made to their agency telework policies within the last year as a result of the Act's requirements. Participants indicated that these modifications have resulted in stronger, more effective agency policies. Procedures to manage notification of eligibility and unscheduled telework also have been implemented by agencies to advance telework programs. Participants addressed the importance of new procedures to increase the effective use of telework across their agencies.

Notable quotes related to what is going well in agencies are shown in the following table.

Table 1: Comments Illustrating Aspects of Successful Telework Programs

Focus Group Question	Notable Quotes
<p>What is going well in your Agency's telework program?</p>	<p>I think the Act helped us because it gave us that legal edge we needed to do some of the things we needed to do. The Act helped us to get a better picture of what's actually going on and to be able to explain telework a bit more. It gave us the spotlight for a little while. I'm worried as we move away from that we'll have to work to be remembered.</p> <p>I don't know how supportive the director general is on a personal level, but her staff all had to get telework agreements and that had a big effect. It said "we're on board." She doesn't give many speeches on it, but led by example.</p> <p>We have about 90% of staff eligible because we went very broad. One thing we did differently is that we tried to sell it to managers as a productivity tool. We said work-life balance is icing on the cake, but the key thing is how to make this a productivity tool and that seemed to help more hesitant managers.</p>

Figure 1: Successes of Agency Telework Programs by Proportions of Telework Managing Officers (TMOs) and Telework Coordinators



Challenges faced by Agencies

Focus group participants also shared challenges they faced in advancing telework within their agencies. Again, responses reflect both unique challenges and barriers, as well as more common experiences across agencies.

Of the 21 total participants:

- 6 participants (29%) reported that gaining buy-in and manager resistance have been factors that have presented challenges for their telework programs,
- 3 participants (14%) commented that performance management has been challenging,
- 3 participants (14%) noted technology related challenges,
- 4 participants (19%) reported challenges relevant to the equity with which telework has been made available to employees, and
- 3 participants (14%) noted the challenge of limited *access* to senior level leadership for program partnership and support.

Please see Figure 2 for a graphical representation of the focus group results regarding what challenges agencies faced as they develop telework programs.

Manager Buy-In

While several agencies described success in establishing leadership buy-in, they also described the challenges of gaining manager buy-in. Participants shared that some managers are used to being able to see their staff members physically working in the office (typically described as line-of-sight management) and that they find comfort in this dynamic. Preference for this style of management poses a recognizable challenge to telework.

Others commented that resistant managers are unsure of how to effectively manage employees who are working remotely and, therefore, are reluctant to embrace the numerous possibilities for effective teleworking arrangements. One participant shared what has worked at his/her agency by commenting, "One of the things we did was to obtain support for managers to be included in telework, because initially they weren't covered. Once we covered them with our policy, they were able to model that behavior."

Several participants shared that some managers in their agencies have not accepted the fact that there should *not* be a difference between how teleworkers are managed and how employees who are completely office-bound are managed (as stated in the Act). Highlighting the importance of sharing information, another participant stated, "The managers who do allow it have presented best practices at manager meetings. We did not see a big boost in numbers of telework, but it [manager presentations] did encourage a slightly more receptive perception of telework."

Performance Management

In a similar vein, successful performance management also proved to be challenging for some of the agencies that were represented in the focus groups. Several participants described the lack of an effective performance management system that focuses on outcomes. Others stated that problems with performance management are fundamentally about education and that managers need to be trained in how a telework program can be applied successfully and seamlessly in accord with performance management standards. Further illustrating the challenge, participants commented that some managers seem unaware of how to help staff members identify aspects of their jobs that can be effectively performed remotely.

Technology

As described earlier, a number of participants noted the importance of effective technology to the success of telework. Several focus group participants also identified technology as a challenge area for advancing telework. Participants shared that teleworkers within their agencies only have access to a Government-issued BlackBerry rather than a laptop. Others commented that there is no available access to shared drives for teleworkers. Participants also shared that there are challenges with the use of personal computers by teleworkers due to security issues. Some participants spoke of budgetary constraints and the consequent impact on the availability of equipment for teleworkers. One participant stated, "This is an austere budget environment, so if you're an agency with less telework already, and less available equipment, it will be a challenge to equip everyone that will be teleworking."

Equity

Multiple participants stated that telework has not been applied in an equitable manner across their agencies. Some participants shared that, although all positions have been deemed eligible within their agency, not all employees are permitted to exercise the option. Others commented that employees in professional positions tend to be able to exercise telework to a greater extent than employees in administrative or support positions in their agencies. One participant shared, "We have pockets where a lot of people telework, and others where they haven't because the supervisor isn't on board or the staff doesn't realize the value of it. We have to find ways to share the practices across the agency."

Access to Leadership

Lastly, a few participants shared that in their roles as telework champions within their agency, an important challenge is posed by limited access to agency top leader(s). One participant commented, "If there was a specific need, we may be able to do something to contact them. But for us getting there is heavy duty." Participants agreed that it would be extremely helpful to improve and increase opportunities for collaboration with their senior leader(s) on telework issues.

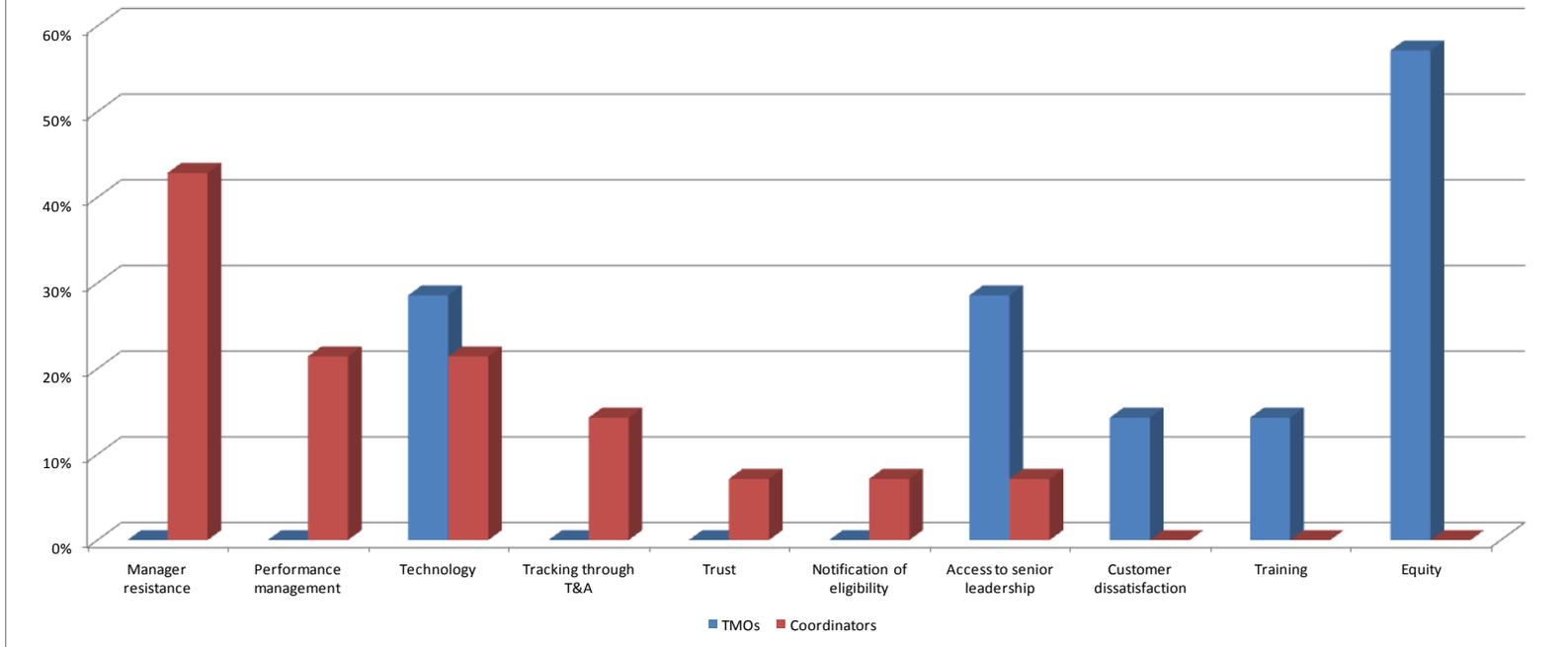
Notable quotes addressing challenges to agency telework programs are shown in the following table.

Table 2: Comments Describing Challenges to Telework

Focus Group Question	Notable Quotes
<p>What has been your Agency’s experience in achieving manager buy-in?</p>	<p>One of the things we did was to obtain support for managers to be included in telework, because initially they weren’t covered. Once we covered them with our policy, they were able to model that behavior.</p> <p>When I think of it, all of our managers telework as well. So the fact that they telework encourages their personnel to telework. Great support from the manager level.</p> <p>The managers who do allow it have presented best practices at manager meetings. We did not see a big boost in numbers of teleworkers, but it [manager presentations] did encourage a slightly more receptive perception of telework.</p>
<p>What are the top challenges you have faced in advancing telework in your agency?</p>	<p>This is an austere budget environment, so if you’re an agency with less telework already, and less available equipment, it will be a challenge to equip everyone that will be teleworking.</p> <p>Implementing the Act isn’t a priority for the agency head in the biggest agencies. It doesn’t have that level of urgency. It leaves us with some discretion and opportunities to get things further. There’s more lateral communication than vertical. Not a bad thing.</p> <p>The Law didn’t say how you notify! Standard letters issued to managers to help them understand the intent of the law and what they could use in conversation with employees who wanted to telework was helpful. Having access to standardized language helped managers have a discussion with employees who could not telework based on sensitivity of work, etc. Several grievances on telework too from employees who wanted to telework, but could not because of performance, leave issues, etc.</p> <p>A major challenge in big agencies is that the TMO won’t have access to the agency head. Assistant Secretaries don’t have access. If there was a specific need, we may be able to do something to contact them. But for us getting there is heavy duty. Quite surprising how closed ours was to it, he didn’t want to get involved.</p>

Focus Group Question	Notable Quotes
	<p>Another challenge, not having access to other TMOs, etc. during roll-out of the Act. Would be helpful for collaboration (mentioned community of practice).</p> <p>Equity in the application of telework. I see the professional side of the house automatically in. On the support side, oftentimes there is resistance to allowing them. We still have managers that want to see these people all the time. I find it difficult to see how the managers can work at home without any question, but those who support them can't.</p>

Figure 2: Challenges of Agency Telework Programs by Proportions of Telework Managing Officers (TMOs) and Telework Coordinators



Differing Perspectives: TMOs and Coordinators

Figures 1 and 2 show the proportions of TMOs and coordinators that cite various successes and challenges of their telework programs. The chart separates TMOs and coordinators in order to reflect their unique experiences with their telework programs. There is a critical distinction between their perspectives. While TMOs frequently reported successes that are high-level in nature, including achieving support from labor organizations, overcoming agency-wide technology barriers, and gaining support from senior leadership, coordinators reported successes relating to an employee point of view and the implementation process. With respect to challenges faced in telework programs, similar trends emerged among TMOs and coordinators. TMOs cited concerns over broader issues like ensuring equitable access to telework, training, and technology, while coordinators mentioned manager resistance, difficulty in monitoring and measuring performance, and trust between employees and managers.

Specific Program Management Challenges

A specific, but recurring, challenge related to the establishment of the TMO by the Act. Different issues were raised by coordinators and TMOs. For example, one challenge raised by coordinators was that the addition of the TMO position can result in an extra layer of oversight that can make it difficult to complete projects and goals. Some coordinators reported that they do not have the autonomy they once had to manage their agency's telework program and, as a result, cannot follow through with goals and objectives without vetting plans through the TMO. Depending on the ease of access that a coordinator has to his or her TMO, this dynamic can prove challenging and can result in additional time to complete initiatives. Similarly, TMO participants discussed the challenge of not always having the direct and easy access to executive-level leadership necessary to carry through with telework-related goals and objectives.

Some of the coordinators also said they still see themselves as the individuals taking care of the daily operations of their agency's telework program, but that, with the addition of the TMO position, they have lost some of the recognition for ensuring effectiveness of the programs. Other coordinators shared that their relationship with the TMO at their agency is one of true partnership and regular communication and that the loss of recognition has not been an issue.

Responding to the Telework Enhancement Act

The focus group protocol included questions that asked participants to describe their experiences responding to the requirements of the Telework Enhancement Act. Participants were asked how employees in their agency were notified of their eligibility to telework. Multiple participants reported that, at the time of the focus groups, their agencies were not finished with the process of informing employees of their eligibility status. Others had informed employees and described a number of methods and systems such as mass emails, the agency intranet system, all-hands meetings, or an agency newsletter. Still others described a

process where supervisors were informed of their staff member’s eligibility in supervisory meetings and then charged to verbally inform their employees directly of their eligibility status.

Participants also were asked how telework is being used, if at all, in emergency preparedness and/or COOP planning in their agency. The majority of participants reported that telework had been folded into their agency’s COOP plan. A couple of participants shared that telework had not been successfully incorporated in the agency COOP plan, but that there are plans to do so in the near future. One participant stated that telework is a part of his/her agency’s COOP plan, but that there has been very little in the way of testing the system or practicing response in the face of a mock emergency. This participant shared that all employees in his/her agency have the tools and are equipped, but that many have not practiced and may not actually be prepared and ready in the face of an actual emergency.

Table 3: Quotes related to Specific Challenges

Focus Group Question	Notable Quotes
<p>What changes, if any, have you made to your telework programs in response to the Telework Enhancement Act?</p>	<p>The problem with telework is that it’s a good idea in search of a purpose early on in the sense that there’s a long list of things we wanted to solve and we called it telework. We can’t get our arms around it. There’s a certain feeling like, the Act passed so we have to get this done from the department’s point of view. But embracing it as a tool is an ongoing process.</p> <p>We began setting goals and developed a training piece. The Act did help to change the mindset; we have a program and it has done well, but the Act caused us to ask: What can we do now? What goals do we need to have? The training component has not been there, but because of the Act we developed our own training. Training should help advance telework, and encourage support from managers. Also, the training should help employees to really understand how to better telework.</p>

Lessons Learned

Many focus group participants reported aspects of strength and success in the ongoing implementation of Federal agency telework programs. Participants also shared areas where change and development has been challenging. Given these experiences, all of the agencies interviewed had “lessons learned” that they believe are important. These are shared here:

Gain Leadership Buy-In

Several participants agreed that gaining buy-in from leadership members at all levels is key to a successful telework program. Comments indicate that gaining leadership support can truly be the catalyst for effective implementation, and buy-in occurs when managers try it for themselves.

Involve Critical Functions

The importance of partnering early and often with union representatives and IT experts within agencies was mentioned as particularly instrumental to the success of telework programs. Involvement of all critical parties and functions will limit the number of unexpected surprises and is important for ensuring the effective collaborations necessary for long-term success.

Institute Reliable Data Collection

Participants also commented that instituting a reliable data collection or tracking procedure is critical to demonstrating telework success and as a tool for long-range planning and managing for program effectiveness. One participant commented, "As a whole, we need to have a better system for tracking telework. Providing data for the OPM Data Call is difficult for many who have to manually track telework participation. Governmentwide, we need to make it easier to collect and report data." Other participants noted that online application systems need to be comprehensive before going live to ensure seamless application. This is another area where partnership with IT and security experts is crucial.

Standardize Eligibility and Participation Criteria

Participants described the importance of standardizing eligibility decisions and notification. Some agencies notify their employees via mass email and/or during new employee orientation, while others prefer managers to send individual emails. Participants agreed that part of increasing trust in the telework process is to make sure that communications and notifications are handled fairly and according to established standards across an agency.

Measure Performance Accurately

Agencies reported facing challenges of performance management in advancing their telework program. Participants stressed the need for performance management systems to measure the outcome of completed tasks and goals. They agreed "managers want to know exactly what teleworkers are working on when out of the office". It is critical for performance management systems to directly link to agency-wide performance plans.

Be Patient

Lastly, several participants emphasized the importance of remaining aware that change takes time and progress with telework requires patience. One participant suggested that one way to address this is to make sure that telework goals and objectives are clear and shared across an agency and that information about progress toward those goals is also shared on an ongoing basis.

Table 4: Participant Recommendation Highlights

Focus Group Question	Notable Quotes
<p>If you had to share one lesson learned from your telework program, what would it be?</p>	<p>Make sure you have a process in place by which to compile data via Web T.A. For people moving to implement telework I would say make sure you have the infrastructure before moving forward.</p> <p>As a whole, we need to have a better system for tracking telework. Providing data for the Call is difficult for many who have to manually track. Governmentwide we need to make it easier to collect and report data.</p>
	<p>A point I'd like to make is that we're in this political environment now where we can never close down. I just hope that when OPM does their briefings for Congress you will remind them that there are many agencies that NEVER close down and have been operating 24/7 for a century. It's not that different without the official telework policy. That message is not getting through to Congress.</p>

Focus Group Appendix A

Structured Questions for Coordinators and Telework Managing Officers (TMOs)

Advancing Agency Telework Programs

The purpose of the first few questions is to understand how telework is going in Federal agencies. Please think broadly when answering the first few questions. (Advise participants that they will be asked specific questions about the Act; advise them to think broadly here.)

- What is going well in your Agency's telework program?
- What are the top challenges you have faced in advancing telework in your agency? We ask you to limit your list to no more than 3.

PROBE: Has IT capability been an issue for the utilization of telework? If so, how has this issue been resolved?

PROBE (TMOs only): What challenges have you faced in leading the telework program?

General Questions about Implementing Telework Programs

- What role did your Agency's leadership play in the success of the telework program?

PROBE: How has your Agency leadership communicated support for telework?

- What has been your Agency's experience in achieving manager buy-in?
- How have you communicated the message of support across your Agency?

The Telework Enhancement Act

Now let's turn our attention more specifically to the Act. The purpose of the next few questions is to learn more about your experiences with implementing the Act.

- What changes, if any, have you made to your telework programs in response to the Act?

PROBE: How has the Act helped to expand/improve your Agency's telework program?

PROBE: What are the specific challenges you've faced in implementing the Act.

PROBE: What key things are you currently working on to implement the Act?

- Thinking about implementing the Act, how did you communicate with employees about their eligibility?

Questions about Telework Program Effectiveness

- Would you describe your telework program as “successful?” How do you define success for telework? What is the evidence you are using to arrive at this conclusion?

PROBE: Describe any goals/outcomes you have specified for your program.

PROBE: Does your telework program address (or track) cost-benefit and/or performance measurement? If so, how?

- How is telework being used, if at all, in emergency preparedness and/or COOP planning in your agency?

Finally....

- If you had to share one lesson learned from your telework program, what would it be?

Conclusion of the Session

- Thank everyone for participating and remind them that their efforts will be used as qualitative data in the Report to Congress.
- Share WLW staff contact information in case questions/concerns arise following the focus group.

Appendix 2: Literature Reviews and Best Practices for Agencies

In response to the Telework Enhancement Act of 2010, two literature reviews were compiled by OPM researchers. They detail best practices for agencies and summarize the state of the literature on telework as a tool for reducing energy use and environmental impacts, alleviating traffic congestion, and increasing job availability.

Telework, Energy, Transportation, and the Environment

Telework can be a useful tool for agencies or organizations that hope to lessen traffic congestion, reduce greenhouse gas emissions, and improve local air quality. Both the public and private sectors have steadily come to promote telework as a means for achieving a variety of goals. Frequently telework is credited with decreasing energy costs, adverse environmental impacts, and emissions of greenhouse gases. This may be a fair assumption, but both the private and public sectors have room to improve methods of measuring and verifying these savings.

The energy impact of telework can be broadly modeled as a function of transportation, home and office space and equipment, and information and communication technology (Horvath, 2010). Below are a few highlights from the growing literature on telework, energy, and the environment.

- The estimated impact of telework on **national energy use** is small. One study estimated national energy savings of between 0.01 and 0.40 percent in the U.S. and 0.03 to 0.36 percent in Japan (Matthews & Williams, 2005).
- Numerous studies have estimated the impact of telework on **vehicle miles traveled**, or VMT, which in turn impacts gasoline consumption and traffic congestion. One conservative estimate puts the impact of teleworking at about 1 percent of overall U.S. household VMT (Mokhtarian, 1998). Although this reduction appears small, telework is a much more cost-effective method of reducing congestion than other approaches, such as expanding mass transit (Choo, Mokhtarian, & Salomon, 2005).
- Telework appears to result in significant trip reductions and lower VMT for individual teleworkers. Multiple studies have found that individual employees save in the range of 30 to 50 miles per day or 50 to 80 percent less VMT per year (Lake, 2008).
- Beyond energy use, telework can impact **greenhouse gas emissions** and **office space** needs. Studies have estimated a possible savings of 3.5 billion square feet of office space (Romm, 2002) and a ten year savings of 312.4 million tons of greenhouse gas emissions (Fuhr & Pociask, 2011).

Many studies suffer from an inability to account for all the different ways the work environment affects energy use. A few have emerged that attempt to quantify the **net impact** of telework on energy consumption in the home and office. Below are a few conclusions of these studies:

- When teleworking, employees have lower impacts on energy consumption and air pollution. Non-telework energy use and air pollution costs are likely equal to or higher than those for telework days (Kitou & Horvath, 2008).
- Telework generally reduces air pollutant emissions, but may not reduce all types of emissions equally.⁷ Impacts will differ by pollutant, location, heating or cooling season, induced travel, avoided VMT, latent demand, and minimizing space and equipment use when teleworking. Program designers must consider factors such as their local climate, energy mix, transportation patterns, and whether teleworking employees will maintain offices at home and at the central worksite (Kitou & Horvath, Energy-related emissions from telework, 2003).
- Certain forms of transportation may actually increase emissions. Substituting shorter commutes may not reduce energy or emissions because of rebound effects from home energy use. A rebound effect is an unintended increase in energy use due to a behavioral change or new technology that negates the savings from the change. Successful telework programs will encourage the avoidance of polluting forms of transportation, increase commuter vehicle occupancy rates, substitute longer commuters, and increase teleworking frequency (Kitou & Horvath, Transportation choices and air pollution, 2006).

Success Stories in the Private Sector

A quick search of media associated with telework will reveal a number of striking savings estimates from private companies. Companies have reduced energy costs, real estate costs, employee fuel costs, other utility costs, and travel costs. These estimates certainly suggest that telework has great potential for all sectors to save on energy and building costs.

One company has reported savings of \$387 million in reduced office space and utility costs due to its telework program between 2002 and 2008. In 2009, another company reported savings of \$10.3 million in employee fuel costs and 47,320 metric tons of avoided greenhouse gas emissions. A third company reported saving \$550 million in real estate and reduced overhead costs between 1991 and 1997.⁸

Success Stories in the Federal Government

While Federal Government data on telework participation and frequency has been collected over the years, there is still much more to learn about how telework has impacted energy use,

⁷ Telework reduces the emissions of carbon dioxide (CO₂), mono-nitrogen oxides (NO_x), particulate matter (PM₁₀), and carbon monoxide (CO) but not nitrous oxide (N₂O) and methane (CH₄).

⁸ As a caution, often these savings figures come from telecommunications companies that may have a vested interest in supporting telework. Many are reported without background on how the estimates were produced and which assumptions were made. Lastly, the units of measurement of the savings differ widely and assumptions – if provided – also differ. This makes comparisons very difficult. Nonetheless, the savings numbers are impressive.

air quality, and emissions within the public sector. Agencies are still adapting to new telework programs and searching for new ways to estimate savings. Yet, a few examples from the Federal Government stand out as models for future research on the potential of telework to reduce energy use and environmental impacts.

- The United States Patent and Trademark office (PTO) is widely considered a leader in telework within the Federal Government. PTO has 7,030 teleworkers (86.52 percent of eligible workers) and 8,125 eligible telework positions (78.35 percent of the agency). Of PTO's teleworkers, 3,739 of them telework 4 to 5 days per week. Employees who telework 4 to 5 days per week relinquish their office space and use a hoteling system when at the Alexandria office. As a result of this unique arrangement, PTO has realized \$19.8 million in real estate savings as of August 2011.
- GSA has developed an Excel-based tool for agencies wishing to calculate the break-even point for the costs of telework, purchasing information technology, and real estate savings – the Cost-per-Person Model (Kaczmarczyk, 2008). A GSA commissioned study by Booz Allen Hamilton found that agencies could realize a return on investment of between 225 percent and 1500 percent through a variety of telework program arrangements (General Services Administration, 2006).
- The National Institutes of Health has pursued cost savings from telework through its hoteling initiative. In 2007, the National Science Foundation found that employees saved, on average, 62 hours of commuting time, \$1,201 in costs, and 1,751 lbs of emissions in a year of teleworking. This amounted to a 12 percent reduction in National Science Foundation teleworkers' carbon footprint (Telework Exchange, 2008).

Best Program Designs for Achieving Broad Community and Societal Goals

While research still must be improved and expanded, a review of the existing literature shows promise for telework as a tool for addressing energy and environmental challenges. The Telework Enhancement Act of 2010 has reaffirmed the Federal Government's commitment to expanding telework while accurately measuring participation and success. Undoubtedly, this will result in useful information that will help agencies better assess programs and design programs around achieving goals. For some agencies, energy savings and environmental impact may be among the most important program goals. Evidence suggests that agencies seeking to reduce energy costs and emissions should consider the following design elements:

- **Maximize hoteling in order to decrease office space.** If teleworkers maintain offices at work and if lights and equipment are left turned on at all times, this significantly decreases the potential savings from building costs and utility bills.
- **Encourage teleworking for those with longest commutes.** Evidence suggests that the most substantial energy savings benefits occur for those with long commutes and in some cases energy use at home could be greater than savings from telework (Kitou & Horvath, 2008).

- **Consider cost transfer to employees.** Some have suggested that energy savings from telework could merely be transferring utility costs onto employees rather than resulting in a net energy and cost savings overall (Overmeyer, 2011).
- **Consider local electricity energy mix.** Teleworking could be reducing pollution from one source (the source that powers the office) while increasing it at a dirtier source (the source that powers the home).
- **Be flexible with program design.** Developing a variety of telework arrangements that can be flexibly applied, as has been done by PTO, could maximize the energy benefit potential of a program.
- **Use information and communication technology effectively.** Technology plays a critical role in any telework program. Creativity can help maximize the energy benefit. For example, an agency could replace some air travel with teleconferencing or establish telework centers for those uncomfortable with working inside the home.
- **Educate teleworkers about how to save energy while teleworking.** Educating teleworkers about the arrangements and behaviors that best save energy and reduce pollution could increase the benefits seen from the program. Many workers may have personal desires to further these goals, but may be unsure of the best means to do so.

In order to succeed, telework programs must be thoroughly planned and all transportation and non-transportation trade-offs should be considered. Poor building management, inefficient work arrangements at the office, and low frequency telework schemes can offset any potential energy savings from telework (Kaczmarczyk, 2008). With careful planning, experimentation, and data collection, agencies as well as private companies can realize substantial cost savings while exercising societal responsibility through reducing energy and environmental impacts.

Increasing Job Availability through Telework

As noted previously, telework is promoted and implemented in order to achieve a variety of objectives. While a primary set of objectives includes recruitment, retention, and productivity, telework also has been pursued as a tool for job improvement and for making jobs more available to traditionally underserved populations. These last might include new mothers, employees with disabilities, and aged workers. Underserved populations are particularly strong candidates for telework because they may be hindered by substantial barriers that can be alleviated through using telework as a workplace flexibility (Tremblay, 2003; Feldblum 2008)

There is substantial anecdotal evidence to support the use of telework towards improving job satisfaction and expanding job availability. The available empirical studies, however, tend to focus more on telework as a tool for improving the workplace, rather than on telework's potential to create or expand job opportunities for specific populations. In fact, it is still not clear how telework creates jobs as opposed to making it possible for certain types of people to apply for jobs they would not be able to apply for otherwise. While qualitatively, the range and approximate magnitude of economic impacts such as productivity, wage rates, absenteeism and retention

rates has been well researched (mostly through surveys), quantitative estimates or forecasts of specific economic impacts of telework have been sparse (Doherty, Andrey, & Johnson, 2000). This trend is not only reflected in this report, but across the study of telework as a whole (Bailey & Kurland, 2002). Research suggests this measurement challenge may be due to "the lack of formal methods of reviewing or monitoring [telework] program success and the fact that many different 'players' exist in the administration and success of [telework] programs, combined with the wide range of possible organizational, individual and societal impacts in the short- and long-term (Doherty, Andrey, & Johnson, 2000)."

Success Stories in the Private Sector

The private sector provides unique insight into job creation and availability. Literature examining telework in the private sector commonly addresses job creation and job availability through rural development. Many universities, including Washington State University, have identified and encouraged telework as a strategy to revive the rural economy (Washington State University, 2004). Telework can be a very attractive employment option for economically struggling former manufacturing areas, seasonal resort areas, and cold-climate locales. Regions such as the mid-Atlantic and Northeast have lost population and tax base to the high-tech Northwest or warm southern regions of the United States because these areas have been better able to sustain year-round residents. The answer may lie in luring more residents who can work for anyone from anywhere (Fenson & Hill, 2003).

Examples of this revitalization can be found in Colorado ski communities such as Steamboat Springs and Telluride, which have been actively seeking to attract professional teleworkers. By design, these professionals live in the towns and communities (Fenson & Hill, 2003). The towns do not have to create industrial infrastructure or deal with industrial pollutants, and the areas can maintain a highly educated, well-paid populace. Creating these communities requires providing workers with access to a commercial airport, overnight mail services, and computer-based digital switching for telephones. In the past, this was particularly challenging for rural communities (Fenson & Hill, 2003).

Smaller communities outside large metropolitan areas can enjoy enormous benefits from telework. Teleworkers contribute to the revitalization of small towns in outlying areas. A well-placed telework center can allow residents to retain or secure a position with a firm in a metropolitan or inconveniently located area while continuing to work in close proximity to their rural homes. This can enhance retail, service, and food vendor revenue in the smaller struggling community as well (Fenson & Hill, 2003).

The literature suggests that issues associated with increasing telework in rural areas primarily lie in the lack of existing technological infrastructure (OECD, 2001). However, there is little qualitative data that identifies specific challenges to infrastructure provision. Overall, there is a wealth of private-sector information that discusses the benefits of telework, but little that addresses the challenges these companies face in program implementation. More qualitative

data is necessary to completely understand the challenges of implementing telework programs in rural areas.

Best Program Designs for Making Jobs More Available through Telework

- ***Expanding telework participation.*** In the United States, particularly in the public sector, agencies increasingly offer telework as a flexible workplace option. NASA's Langley Research Center, GSA, and other agencies have all established telework programs to meet their workforce needs, with some promising results. GSA reports that telework has been made available to 92 percent of its 12,205 employees (Feldblum, 2008).
- ***Legislation can expand opportunities for underrepresented populations.*** In the public sector, teleworking as a method to create and make jobs available differs in perspective between Federal and state government. In general, the Federal Government shows greater rates of participation in telework than state governments (Telework Research Network, 2011). This is predominantly due to the passage of legislation geared toward creating flexible work environments for specific groups, including disabled, veteran, and aged workers such as the Federal Employees Flexible and Compressed Work Schedules Act, the Americans With Disabilities Act (ADA), New Freedom Initiative, and most recently the Telework Enhancement Act of 2010 (Feldblum 2008; Virginia Commonwealth University, 2005; Eyster, Johnson, & Toder, 2008). The ADA of 1990, enacted over 20 years ago, provides a way for people with disabilities to maintain inclusion in the age of technology by deeming telework a reasonable accommodation. The ability to telework provides potential for employment opportunities for people who may not otherwise access or perform in a traditional work environment due to a disability (Sullenger, 2006).

Just as there are policies and legislation in place to support job availability and job creation at the Federal level, a number of states have also played an integral role in increasing telework in their respective legislatures. According to a report on Workplace Flexibility by the Georgetown Law Center (2006), California, Georgia, Michigan, Utah, and Virginia are a few among many states that have enacted laws to increase opportunities through telework, whether in the form of private/ public partnerships or providing private-sector incentives to companies with telework policies.

- ***Using telework as a tool to encourage retention of workers nearing or at retirement age.*** The demographics of the workforce in the United States are rapidly changing as the Baby Boomers reach retirement age. Studies indicate that workers aged 55 to 64 in the American workforce will increase by 48 percent in the next five years, and those aged 65 and older will increase by 40 percent. The Federal workforce has already begun to experience the impact of this shift as a large percentage of Federal employees are eligible to retire, risking a decrease of institutional knowledge and years of expertise. However, similar to the workplace dynamics in New Zealand, retirement-age workers are willing to postpone retirement despite their eligibility, whether by necessity or choice. Regardless of the choice, older employees will want or need

employment opportunities that support workplace programs such as flexible schedules and telework (Feldblum, 2008).

In 2006 the Department of Labor published a report suggesting that workplace flexibilities are particularly attractive to older workers and might help ensure their continued services (and thus better knowledge management) especially in an era when many Baby Boomers are now retirement eligible.

- ***Using telework as a tool to promote employment of highly trained and skilled veteran and employees with disabilities.*** In 2004, the Department of Labor, Office of Disability Employment Policy, funded three projects to help recently disabled veterans and workers' compensation clients with disabilities to get the training and equipment they need to find and perform teleworking jobs (West & Davis, 2007). Virginia Commonwealth University was funded as one of the projects. Their national employer survey (issued to public and private employers) regarding telework and employees with disabilities revealed that respondents were generally amenable to accommodating employees with disabilities and those with other pressing needs. The findings also revealed that most organizations that allowed employees to telework did so on an ad hoc basis. However, respondents were more likely to allow telework when the employee already had a work history in the organization and the supervisor and coworkers had confidence in the employee's work habits and dedication (West & Davis, 2007).

Appendix 3: Measurement Model

The table below outlines the evaluation measurement plan begun in 2011, with descriptions of objectives, measurement, and data source. Recall that agency telework under the Act is largely in a formative stage of program development. Consequently, initial measures have been designed predominantly to describe telework implementation.

Activity and Expected Effect	Measures	Data Source
Telework programs are fully implemented in Federal agencies.	Number of agencies with Telework Managing Officer (acting or permanent). Number of employees notified of eligibility to telework, by agency. Number of employees trained to telework, by agency. Number of employees with telework agreements, by agency. Number of managers trained in telework and telework management, by agency.	-Agency records as reported in the annual OPM telework Data Call
Eligible employees routinely participate in Federal telework programs.	Percent of all employees who telework. Percent of eligible employees who engage in routine telework. Percent of telework eligible employees who telework.	- Agency records as reported in the annual OPM telework Data Call - Federal Employee Viewpoint Survey (FEVS)
Telework is used as an effective tool to address unexpected contingencies in the workplace (e.g., disrupted building access for weather or other)	Percent of eligible employees who engage in situational telework.	- Agency records as reported in the annual OPM telework Data Call

Activity and Expected Effect	Measures	Data Source
Teleworkers are resourced to effectively telework.	Percent of agencies who provide equipment and services to teleworkers.	- Agency records as reported in the annual OPM telework Data Call
<p>Cybersecurity concerns are satisfied with telework across agencies.</p> <p>Agency telework policies address cybersecurity issues.</p>	<p>Percent of agencies who address cybersecurity concerns in establishing telework.</p> <p>Number/percent of agencies with cybersecurity addressed in telework policies.</p> <p>Comments from TMOs and coordinators reveal that technical resourcing and cybersecurity issues have been addressed.</p>	<p>- Agency records as reported in the annual OPM telework Data Call</p> <p>-Focus groups</p>
Agency leadership at all levels supports employee telework.	<p>Agency marketing/messaging demonstrates leadership support of employee telework.</p> <p>Percent of agency leadership/managers who participate in telework.</p>	<p>-Focus group data</p> <p>-FEVS</p>
Manager buy-in has been achieved for telework in Federal agencies.	Comments from agency TMOs and coordinators indicate manager buy-in has been established.	-Focus group data
Agency support of telework has been communicated to employees.	Comments from agency TMOs and coordinators describe and outline efforts to communicate support.	-Focus group data
Telework eligibility determinations are fair and based on objective criteria regardless of grade, etc.	Teleworkers compared with non-teleworkers by demographics (e.g., gender supervisory status)	-FEVS

Activity and Expected Effect	Measures	Data Source
<p>Telework is used as an emergency preparedness tool in Federal agencies.</p>	<p>The agency Continuity of Operations Plan specifically addresses telework.</p> <p>The agency Pandemic Influenza Plan specifically addresses telework.</p> <p>Agency telework policies include information regarding telework during emergencies (e.g., who is supposed to telework).</p> <p>Teleworkers are trained to know what is expected of them during emergencies.</p>	<p>- Agency records as reported in the annual OPM telework Data Call</p>
<p>Participation in Federal telework programs has increased since June 2011 under the Telework Enhancement Act.</p>	<p>Percent of agency population that telework beginning in 2011.</p> <p>Comments from agency TMOs and coordinators describe improvements/expansion under the Act.</p>	<p>- Agency records as reported in the annual OPM telework Data Call</p> <p>-Focus group data</p>
<p>Telework program <i>participation</i> goals have been established for telework programs in every agency.</p> <p>Telework program outcome goals (e.g., improved job satisfaction, employee retention) have been established by all agencies.</p>	<p>Number of agencies that report telework goals.</p> <p>Number/percent of agencies with formal plans for increasing employee participation in telework.</p> <p>Number of agencies that report outcome goals.</p> <p>Comments from TMOs and coordinators describe outcome goals.</p>	<p>- Agency records as reported in the annual OPM telework Data Call</p> <p>- Agency records as reported in the annual OPM telework Data Call</p> <p>-Focus group data</p>

Appendix 4: Detailed Methodology for the Data Call

The data in the 2012 Telework Status Report to Congress were derived from three sources: the 2011 OPM Telework Data Call, the 2011 Employee Viewpoint Survey, and a series of focus groups. Each data source is used to capture the perspective of a stakeholder group instrumental in the success of telework.

The methodology employed for focus groups and the Employee Viewpoint Survey are addressed in the main body of the telework status report and elsewhere (see www.fedview.opm.gov). This expanded method section presented in this appendix considers the Data Call only. Note that the Call represents the agency perspective by collecting both quantitative and qualitative data. Through quantitative data we can estimate, for example, how many employees are teleworking or how many agencies have updated their policies. Quantitative data, however, is limited in its explanatory value and how much contextual perspective it can provide. By also examining qualitative data - such as the open-ended items included on the Call form - we can gather explanatory data and gain a better understanding of the setting in which telework programs are evolving.

2011 OPM Telework Data Call

Various versions of the Call have been issued to Federal agencies since 2001. Under the Act, Executive branch agencies are required to report telework data to OPM for inclusion in the annual status report to Congress. A number of agencies also were required to report telework data at the sub-agency/component level. Participation in the Call is currently the only way for agencies to comply with these data submission requirements.

The Data Call Instrument

The Call provides the agency perspective with questions that address agency telework participation and program implementation and processes (e.g., how employees are deemed eligible, how employees are trained and equipped for telework). The instrument used for the 2010 Data Call was revised in 2011 to ensure alignment with the Telework Enhancement Act (see Appendix 3 for the Word form of the Call included in the online platform). While these changes make some comparisons between previous years' Calls less appropriate, they were necessary in order to accurately gauge the changing nature of Federal telework programs. The purpose of the Data Call is primarily to facilitate tracking and assessment of the impact of policy, rather than trend analysis. Using earlier definitions or inapplicable question wordings clearly would not provide useful information and may actually have caused agencies confusion, with negative consequences for item validity and data reliability.

In order to develop the new definitions and questions included in the updated 2011 Data Call, an Interagency Telework Measurement team was assembled and led by Dr. Kimberly Wells, U.S. Office of Personnel Management. Members included acknowledged leaders and experts in Federal telework, including: Dr. Wendell Joice, U.S. General Services Administration; Danette

Campbell, U.S. Patent and Trademark Office; Pam Budda, U.S. Department of Defense; Aaron Glover, Defense Information Systems Agency; Karen Meyer, United States Navy; Scott Howell, National Aeronautics and Space Administration; Bruce Murray, U.S. Department of Energy; and Dr. Alexis Adams, Christina Heshmatpour, Elnora Wright, and Clint Sidwell, U.S. Office of Personnel Management. These method and subject matter experts reviewed the question wordings, question structures, response alternatives, and instructions to ensure that the Call instrument captured the information needed.

Additionally, two cognitive interviews were conducted with a random sample of TMOs and telework coordinators to test how actual respondents might interpret questions. The interviews also helped to ascertain whether typical respondents had the resources needed to answer the questions. Participants in the interviews were asked to go through the Call and think aloud about how they would respond and how they interpret key terms in the questions. To facilitate, W/L/W staff led the sessions using probing questions and noted participants' responses to the questions. The experts' and respondents' comments were integrated into the final Data Call draft.

Finally, an expert in survey development for the Census gave generously of her time and provided detailed review and comments to the Call. Comments were reviewed by the Interagency Telework Measurement Group and incorporated wherever possible.

The Data Call Respondents

The Act requires OPM to “submit a report addressing telework programs of each executive agency” to Congress. OPM maintains lists of executive branch agencies, and these were consulted and used to form the respondent frame for the Call. Discrepancies across lists were resolved in consultation with agencies. The complete list of agencies and sub-agencies contacted to participate in the Call are shown in Appendix 5.

For each agency, a telework coordinator or TMO was designated and confirmed to enter agency data into an online platform. Access to the platform was gained through a unique username and password assigned to each agency data entry POC. To protect data integrity, only one agency POC was supplied with access information.

The Telework Enhancement Act now requires a specified subset of agencies to report data at the agency and subagency levels. Agencies completed the full Data Call for the agency-level submissions. Agencies required to submit at the subagency level provided data only for telework participation and frequency questions. In total, OPM received responses from 87 agencies and 158 subagencies. A few chose not to respond or submit a full response because of security concerns (e.g., the intelligence community) or because they are not subject to the Act's reporting requirements due to the definition of “Executive agency” included in the Act. Several agencies (e.g., the Smithsonian Institution) are not Executive agencies within the meaning of the statute and thus not required to participate, but several elected to do so nonetheless.

Links to the electronic data entry platform for the Data Call were forwarded to agencies on October 26, 2011, with opportunities to enter data until December 9, 2011. Agency points of contact were invited to participate in the Call via email invitation. To encourage participation, three reminders were sent to data entry POCs and TMOs during the administration period for the Call.

Prior to issuance of the Call, data entry points of contact for agencies, coordinators, and TMOs were invited to attend two sessions designed to brief agencies on the Call's content and timeframe as well as to address any questions. These sessions were an effort to support reporting of valid and reliable data. Although OPM does not have the authority to require attendance at these sessions, every effort was made to encourage participation through multiple reminder emails. The first session (September 2011) focused on reviewing the questions and definitions in the Data Call instrument. The second session (October 2011) walked participants through how to use the online platform, and slides from this session were distributed to all invitees regardless of whether they attended. Between the first and second sessions, Federal telework policy was issued regarding the definition of "telework day." This was clarified in the second training session. However, because OPM cannot mandate attendance it cannot assure that all agencies received this information – although each agency's telework staff also learned of this update through the issuance of policy guidance.

Timeframe

The Call was administered in the fall of 2011, between October 26 and December 9. The decision not to request annualized data addressed several data quality concerns. Due to differing data collection methods, many agencies cannot uniformly report annualized data. Some agencies count telework agreements, some get periodic data feeds from payroll providers, and others simply use informal surveys of managers. The choice to target September and October 2011 was made for several reasons. First, agencies were given until June to satisfy Act requirements, so data collection during the program development months of December through June would not fairly represent telework under the Act. Second, July and August typically are vacation months and any data collected for participation during those months would likely under-report telework activity. Third, with the report due in June 2012, the data collection had to occur at such a time as to allow for data analysis and report compilation. These combined factors left only a short window for which telework data could be collected that would represent telework activity under the Act.

Quality Control

In weekly reminder emails, agency points of contact were encouraged to contact OPM staff members who were available to answer any questions agencies had about the Data Call instrument and online platform. Questions mainly pertained to accessing the website and lost passwords, with very few pertaining to the Call instrument or Call items.

Following the Data Call administration, respondents were given several opportunities to check the accuracy of their responses. First, agencies were provided with a review function built into

the online platform that allowed them to view their responses before submitting them. Second, OPM produced and distributed individual reports for each agency data entry point of contact and TMO. Agencies were advised to review and make any necessary corrections to these reports. Responses were updated in the database as needed. A new report was generated and verified by the agency before the agency's data was considered finalized. As a final check, W/L/W staff followed standard analysis protocol and checked the final database for any outstanding anomalies or possible problems in the dataset using descriptive statistics and frequencies. When any discrepancies, outliers, or other anomalous responses were identified, W/L/W individually contacted the agencies to verify and update the data.

Strengths and Weaknesses of the Data Call

The results of the Data Call give insight into agency efforts and status with respect to implementing the Act, how many and how Federal employees telework, summaries of agency goal-setting efforts, and outcomes related to telework. Agency data are quite informative and provide a detailed picture of current Federal telework activities. Program descriptions are particularly valuable and will provide opportunities for interagency sharing of best practices.

Yet, there are some limitations with respect to the participation and frequency findings that should be considered. Agencies rely upon differing methodologies and data sources when gathering participation and frequency data, including time and attendance systems, counting telework agreements, and surveys of employees. Without a standardized Governmentwide data collection system or trained data collection staffs, the final combined telework participation estimates are unlikely to be completely valid or reliable. In particular, many agencies do not have the capability with their current systems to collect all requested data (e.g., situational telework). As a result, the final participation and frequency numbers may underreport telework with consequences for the reliability of the reported results.

When considering these limitations, it is important to note that the participation and frequency questions represent a small portion of the 38 questions in the Data Call instrument. OPM has full confidence in the remaining sections of the Data Call, including those on policy implementation, program goals, emergency planning, information technology, information security, and barriers. In addition, all analyses and coding of qualitative responses were replicated by a second researcher to ensure that all results were accurate and fairly representative of agency perspectives.

Appendix 5: Agencies and Sub-agencies Included in Administration of the Telework Data Call

Agency Name	Sub Agency Name
Agency for International Development	
Alaska Natural Gas Transportation Projects (Office of the Federal Coordinator)	
Board of Governors of the Federal Reserve System	
Chemical Safety and Hazard Investigation Board	
Committee for Purchase from People Who Are Blind or Severely Disabled	
Commodity Futures Trading Commission	
Consumer Product Safety Commission	
Corporation for National and Community Service	
Court Services and Offender Supervision Agency	
Defense Nuclear Facilities Safety Board	
Department of Agriculture	Office of the Assistant Secretary for Civil Rights
Department of Agriculture	Office of Inspector General
Department of Agriculture	Rural Development
Department of Agriculture	Office of General Counsel
Department of Agriculture	Office of Congressional Relations
Department of Agriculture	Food, Nutrition and Consumer Services
Department of Agriculture	Farm and Foreign Agriculture Services
Department of Agriculture	Research, Education and Economics
Department of Agriculture	Office of the Secretary
Department of Agriculture	Marketing and Regulatory Programs
Department of Agriculture	Office of Homeland Security
Department of Agriculture	Departmental Administration
Department of Agriculture	Natural Resources and Environment
Department of Agriculture	Office of Budget and Program Analyses
Department of Agriculture	Office of Chief Economist
Department of Agriculture	Office of Chief Information Officer/Chief

Agency Name	Sub Agency Name
	Financial Officer
Department of Agriculture	Office of Communications
Department of Agriculture	Office of Executive Secretariat
Department of Agriculture	Food Safety and Inspection Service
Department of Commerce	Nat Telecommunications and Info Admin
Department of Commerce	Nat Oceanic and Atmospheric Administration
Department of Commerce	Office of the Secretary
Department of Commerce	Office of the Inspector General
Department of Commerce	Bureau of Economic Analysis
Department of Commerce	National Institute of Standards and Tech
Department of Commerce	International Trade Commission
Department of Commerce	Economics and Statistics Administration
Department of Commerce	Economic Development Administration
Department of Commerce	Bureau of the Census
Department of Commerce	Bureau of Industry and Security
Department of Commerce	National Technical Information Service
Department of Commerce	Minority Business Development Agency
Department of Defense	Department of Air Force
Department of Defense	Department of Army
Department of Defense	Other Department of Defense
Department of Defense	Department of Navy
Department of Education	Office of Safe and Drug-Free Schools
Department of Education	Office of Inspector General
Department of Education	Office of Communications and Outreach
Department of Education	Office of Innovation and Improvement
Department of Education	Office of Postsecondary Education
Department of Education	Office of the Chief Financial Officer
Department of Education	Office of the Chief Information Officer
Department of Education	Office of the General Counsel
Department of Education	Office of Vocational and Adult Education
Department of Education	Office for Civil Rights

Agency Name	Sub Agency Name
Department of Education	Office of the Under Secretary
Department of Education	EDET- Office of English Language Acquisition
Department of Education	Office of Special Education and Rehabilitative Services
Department of Education	Advisory Councils and Committees
Department of Education	Office of the Deputy Secretary of Education
Department of Education	IMM Office of Secretary of Education
Department of Education	Institute of Education Sciences
Department of Education	National Assessment Governing Board
Department of Education	Office of Elementary and Secondary Education
Department of Education	Office of Management
Department of Education	Office of Legislative and Congressional Affairs
Department of Education	Office of Planning, Evaluation, and Policy Development
Department of Education	Federal Student Aid
Department of Energy	
Department of Health and Human Services	Administration for Children and Families
Department of Health and Human Services	Health Resources and Services Admin
Department of Health and Human Services	Substance Abuse and Mental Health Services Administration
Department of Health and Human Services	Program Support Center
Department of Health and Human Services	Office of Secretary
Department of Health and Human Services	National Institutes of Health
Department of Health and Human Services	Indian Health Service
Department of Health and Human Services	Food and Drug Administration
Department of Health and Human Services	Centers for Medicare and Medicaid Services
Department of Health and Human Services	Centers for Disease Control and Prevention
Department of Health and Human Services	Agency for Toxic Substances and Disease Registry
Department of Health and Human Services	Administration on Aging
Department of Health and Human Services	Agency for Healthcare Research and Quality
Department of Homeland Security	US Citizenship and Immigration Services

Agency Name	Sub Agency Name
Department of Homeland Security	US Immigration and Customs Enforcement
Department of Homeland Security	US Secret Service
Department of Homeland Security	US Coast Guard
Department of Homeland Security	Office of the Inspector General
Department of Homeland Security	Federal Law Enforcement Training Center
Department of Homeland Security	Federal Emergency Management Agency
Department of Homeland Security	HQ Components
Department of Homeland Security	US Customs and Border Protection
Department of Homeland Security	Transportation Security Administration
Department of Homeland Security	National Protection and Programs Directorate
Department of Homeland Security	Domestic Nuclear Detection office
Department of Homeland Security	Office of the Under Secretary for Science and Technology
Department of Housing and Urban Development	Office of General Counsel
Department of Housing and Urban Development	Secretary and Deputy Secretary
Department of Housing and Urban Development	Public and Indian Housing
Department of Housing and Urban Development	Public Affairs
Department of Housing and Urban Development	Policy Development and Research
Department of Housing and Urban Development	Housing
Department of Housing and Urban Development	Government National Mortgage Association
Department of Housing and Urban Development	Field Policy and Management
Department of Housing and Urban Development	Departmental Operations and Coordination
Department of Housing and Urban Development	Departmental Equal Employment Opportunity
Department of Housing and Urban Development	Congressional and Intergovernmental Relations
Department of Housing and Urban Development	Community Planning and Development
Department of Housing and Urban Development	Chief Procurement Officer
Department of Housing and Urban Development	Chief Information Officer
Department of Housing and Urban Development	Chief Financial Officer
Department of Housing and Urban Development	Administration
Department of Housing and Urban Development	Fair Housing and Equal Opportunity
Department of Housing and Urban Development	Office of Healthy Homes and Lead Hazard

Agency Name	Sub Agency Name
	Control
Department of Interior	US Geological Survey
Department of Interior	Office of the Solicitor
Department of Interior	Office of the Secretary
Department of Interior	Office of the Inspector General
Department of Interior	Office of Surface Mining
Department of Interior	National Park Service
Department of Interior	National Business Center
Department of Interior	Bureau of Ocean Energy Management, Regulation and Enforcement
Department of Interior	Bureau of Reclamation
Department of Interior	Bureau of Indian Affairs
Department of Interior	Bureau of Land Management
Department of Interior	US Fish and Wildlife Service
Department of Justice	Office of Justice Programs
Department of Justice	US Trustee Program
Department of Justice	US Marshals Service
Department of Justice	Tax Division
Department of Justice	Office of the Inspector General
Department of Justice	Federal Bureau of Investigation
Department of Justice	Executive Office for Immigration Review
Department of Justice	Executive Office of US Attorney and Office of US Attorney
Department of Justice	Bureau of Prisons/Federal Prison System
Department of Justice	Offices Boards and Divisions
Department of Justice	Antitrust Division
Department of Justice	Environment and Natural Resources Division
Department of Justice	Civil Division
Department of Justice	Civil Rights Division
Department of Justice	Community Oriented Policing Service
Department of Justice	Criminal Division

Agency Name	Sub Agency Name
Department of Justice	Drug Enforcement Administration
Department of Justice	Alcohol, Tobacco, Firearms and Explosives
Department of Labor	Office of the Assistant Secretary for Administration and Management
Department of Labor	Occupational Safety and Health Administration
Department of Labor	Women's Bureau
Department of Labor	Veterans Employment and Training Services
Department of Labor	Office of the Solicitor
Department of Labor	Office of the Secretary
Department of Labor	Office of the Inspector General
Department of Labor	Office of the Chief Financial Officer
Department of Labor	Office of the Assistant Secretary for Policy
Department of Labor	Bureau of International Labor Affairs
Department of Labor	Office of Disability Employment Policy
Department of Labor	Office of Administrative Law Judges
Department of Labor	Adjudicatory Boards
Department of Labor	Bureau of Labor Statistics
Department of Labor	Employee Benefits Security Administration
Department of Labor	Employment and Training Administration
Department of Labor	Employment Standards Administration
Department of Labor	Mine Safety and Health Administration
Department of Labor	Office of Public Affairs
Department of State	International Boundary and Water Commission: U.S. and Mexico
Department of State	International Boundary Commission: U.S. and Canada
Department of State	International Joint Commission: U.S. and Canada
Department of Transportation	Federal Motor Carrier Safety Administration
Department of Transportation	Office of Inspector General
Department of Transportation	St. Lawrence Seaway Development Corporation
Department of Transportation	Research and Innovative Technology Administration

Agency Name	Sub Agency Name
Department of Transportation	Surface Transportation Board
Department of Transportation	Pipeline/Hazardous Materials Safety Administration
Department of Transportation	Office of Secretary of Transportation
Department of Transportation	National Highway Traffic Safety Administration
Department of Transportation	Maritime Administration
Department of Transportation	Federal Railroad Administration
Department of Transportation	Federal Highway Administration
Department of Transportation	Federal Aviation Administration
Department of Transportation	Federal Transit Administration
Department of Treasury	Office of Inspector General for Tax Administration
Department of Treasury	Office of Thrift Supervision
Department of Treasury	Internal Revenue Service
Department of Treasury	Office of Inspector General
Department of Treasury	Office of Comptroller of Currency
Department of Treasury	Financial Crimes Enforcement Network
Department of Treasury	Departmental Offices
Department of Treasury	Bureau of Public Debt
Department of Treasury	Bureau of Engraving and Printing
Department of Treasury	Alcohol and Tobacco Tax and Trade Bureau
Department of Treasury	Financial Management Service
Department of Treasury	US Mint
Department of Veterans Affairs	
Director of National Intelligence	Central Intelligence Agency
Director of National Intelligence	National Security Agency
Environmental Protection Agency	
Equal Employment Opportunity Commission	
Executive Office of the President(Science and Technology)	
Executive Office of the President	U.S. Trade Representative

Agency Name	Sub Agency Name
Export-Import Bank of the United States	
Farm Credit Administration	
Farm Credit System Insurance Corporation	
Federal Communications Commission	
Federal Deposit Insurance Corporation	
Federal Election Commission	
Federal Energy Regulatory Commission	
Federal Housing Finance Board	
Federal Labor Relations Authority	
Federal Maritime Commission	
Federal Mediation and Conciliation Service	
Federal Retirement Investment Board	
Federal Trade Commission	
General Services Administration	
Institute of Museum and Library Services	
Inter-American Foundation	
International Boundary and Water Commission	
International Broadcasting Bureau	
Japan-U.S. Friendship Commission	
Marine Mammal Commission	
Merit Systems Protection Board	
National Aeronautics and Space Administration	
National Archives and Records Administration	
National Capital Planning Commission	
National Council on Disability	
National Credit Union Administration	
National Endowment for the Arts	
National Endowment for the Humanities	
National Labor Relations Board	
National Mediation Board	

Agency Name	Sub Agency Name
National Science Foundation	
National Transportation Safety Board	
Nuclear Regulatory Commission	
Nuclear Waste Technical Review Board	
Occupational Safety and Health Review Commission	
Office of Federal Housing Enterprise Oversight	
Office of Government Ethics	
Office of National Drug Control Policy	
Office of Personnel Management	
Office of Special Counsel	
Overseas Private Investment Corporation	
Patent and Trademark Office	
Peace Corps	
Pension Benefit Guaranty Corporation	
Postal Regulatory Commission	
Railroad Retirement Board	
Securities and Exchange Commission	
Selective Service System	
Small Business Administration	
Smithsonian Institute	
Social Security Administration	
Tennessee Valley Authority	
Trade and Development Agency	
U.S. Access Board	
U.S. Commission on Civil Rights	
U.S. International Trade Commission	
United States Holocaust Memorial Museum	

Appendix 6: Telework Data Call Instrument

Welcome to the Office of Personnel Management's (OPM's) 2011 Call for Telework Data (Call). Agency participation in this annual Call is a requirement under the Telework Enhancement Act of 2010, Public Law 111-292 (the Act). This form allows systematic data collection. Results will be collated and reported to Congress. Questions have been revised from the previous Call for Telework Data to agree with data elements outlined in the Act and results of this Call will provide a new baseline for future data collections.

The Call will remain open from **October 24 – November 30, 2011**. During that time, you should complete your data collection and entry according to the following instructions.

REPORTING INSTRUCTIONS (Please Read Carefully)

The questions in the Call ask for information about your program. Please answer every question as completely as possible and respond referring to practices for your current telework program.

Report data according to the specified timeframe

For past data calls, agencies have collected data according to a variety of timeframes; some have collected data at a single point in time and others have averaged data over a calendar year. Combining data from such different sources can lead to inaccuracies in the final combined Federal results. The challenge of achieving an accurate picture of telework Governmentwide is complicated this year by the timeframe of requirements under the Act. Agencies were not required to implement basic aspects of telework programs until early June 2011, and not every agency was able to meet that deadline. To achieve an accurate count of Federal telework participation requires that we collect data according to a time when all programs were more likely to be fully implemented and employees were able to participate. For these reasons, we are asking you to focus your data collection efforts for this Call on the months of **September and October 2011**. Dates given throughout the data call will specify "as of [date]" (e.g. September 30) with the understanding that data collection should occur for timeframes as near as possible to that time. This will ensure that all final data represent the same timeframe to the extent practicable given the varying data collection methods employed by agencies.

Respond consistently and according to majority practice

When responding to Call items, we ask you to respond thinking not of unique practices within your agency, but customary practice as of September 30, 2011, for the majority of the agency as outlined in the agency policy. For example, when asked to indicate your agency goals for telework, answer according to practice of the majority of the organization for which you are responding.

Try to follow the dates suggested for data collection as closely as possible. However, we recognize that not every agency uses the same approach to data collection, and the timeframe for data availability may be unique to your own agency. Just remain consistent about reporting and, when asked, please describe the timeframe you employed as clearly and completely as possible.

Maintain consistent reporting levels

The Telework Enhancement Act is very specific in directing certain agencies to report telework participation data for each bureau, division, or other major administrative unit of the agency. Agencies must respond to Call questions using this level of detail if they are included in the list shown in section 5312 (see Appendix A for the reproduced list). When responding for a specific administrative unit (e.g., agency, bureau, component, division) please be consistent and answer according to what is customary and documented practice for that level of the organization.

[Appendix A](#)

Complete the entire Call according to directions and provided definitions

Please do **not** skip items when responding to the Call. It is important for us to have the best, most complete information possible. The answers you provide to this Call will help OPM develop telework guidance and resources for the Federal Government and will be shared with Congress.

Unless indicated otherwise, please select only one response to each item. Some items do allow more than one response and will include special instructions such as “Mark all that apply.” Other items also allow for open-ended responses such as description of specific agency practice.

Read the [definitions and data terms](#) carefully before responding to the survey.

Report numbers accurately

When a question calls for numbers, be sure to enter whole numbers without decimal points or commas (as examples: 8.2 should be written as 8 and 1,500 should be written as 1500). If you have no data in a particular category, please indicate in spaces provided for explanation (e.g., “other”). However, when a required question calls for numbers, you must enter a number. For example, if you do not have any routine teleworkers that work 3 or more days during a two week period, report 0 (zero) in the answer space.

Please complete and submit the Call by the deadline

The site to enter data will be open as of October 24, 2011. All responses must be received by COB November 30, 2011. Failure to submit your data by this date will mean that your agency

will not be included in the annual telework report to Congress. Keep in mind that the Telework Enhancement Act requires that each Executive agency submit telework data to OPM for inclusion in the June 2012 report and subsequent annual reports to Congress. Currently, responding to this data call is your only opportunity to ensure that your agency has met the reporting requirements in the Act.

If you have concerns or questions about this Call for data, please contact us at WorkLifeSurvey@opm.gov.

- [Definitions and Data Terms](#)

DEFINITIONS AND DATA TERMS

The Telework Enhancement Act provides the official Governmentwide definitions for telework. The version below considers practice and operationalizes the Act definition. **Please respond to the Call using this definition:**

Telework is a work arrangement that allows an employee to perform work, during any part of regular, paid hours, at an approved alternative worksite (e.g., home, telework center). This definition of telework includes what is generally referred to as remote work but does *not* include any part of work done while on official travel or mobile work. See the following clarifications on remote and mobile work.

Include in reported counts of telework:

- REMOTE: (1) A work arrangement in which the employee resides and works at a location beyond the local commuting area of the employing organization's worksite. (2) A full-time telework arrangement.

Do not include in reported counts of telework:

- MOBILE: (1) Work which is characterized by routine and regular travel to conduct work in customer or other worksites as opposed to a single authorized alternative worksite. Examples include site audits, site inspections, investigations, property management, and work performed while commuting, traveling between worksites, or on Temporary Duty (TDY).

Employee

For the purposes of this data collection, the term **employee** refers to *Federal civilian* employees. Please exclude military personnel and contractors. If possible, include full-time, part-time, and intermittent employees in totals.

Eligibility to Participate in Telework

The Telework Enhancement Act refers to telework "eligibility" and "participation." For purposes of this survey we have combined eligibility and participation into a single factor: ***eligibility to participate*** in telework. When responding to Call questions use the following definition:

An employee is **eligible to participate** in telework if all of the following parameters are true:

- The employee has not been officially disciplined for being absent without permission for more than 5 days in any calendar year.
- The employee has not been officially disciplined for violations of subpart G of the Standards of Ethical Conduct for Employees of the Executive Branch for viewing, downloading, or exchanging pornography, including child pornography, on a Federal Government computer or while performing official Federal Government duties
- Teleworking does not diminish the employee's performance or agency operations.
- For employees' participating in the telework program, participation and performance complies with the requirements and expectations of his/her telework agreement.
- The employee's official duties do not require on a FULL daily basis (ALL DAY, every work day):
 - direct handling of secure materials determined to be inappropriate for telework by the agency head; or
 - on-site activity that cannot be handled remotely or at an alternate worksite.
- The employee and/or the employee's position are not disqualified based on additional criteria established by the organization.

Types of Telework

For purposes of this data collection, there are two types of telework. Questions in the Call refer to both forms:

1. **Routine:** telework that occurs as part of an ongoing, regular schedule, and
2. **Situational:** telework that is approved on a case-by-case basis, where the hours worked were not part of a previously approved, ongoing and regular telework schedule.

Examples of situational telework include telework as a result of special work assignments or doctor appointment. Situational telework is sometimes also referred to as episodic, intermittent, unscheduled or ad-hoc telework.

General Questions

- 1) Please enter your agency or sub-agency name: _____
- 2) Please provide the following information about your Agency Telework Representative who prepared the report:
 - Last Name: _____
 - First Name: _____
 - Phone: _____
 - Email address: _____
- 3) Please provide the following information about your Agency Telework Managing Officer:
 - Last Name: _____
 - First Name: _____
 - Phone: _____
 - Email address: _____
- 4) The Telework Managing Officer as of this data call is:
 - Acting
 - Permanent
 - We do not currently have a Telework Managing Officer.

Telework Participation

- 5) What was the total number of employees in your agency as of September 30, 2011 (or the closest date for which you have data)? Answer for the largest administrative unit for your organization, that is, your agency/department. _____
- 6) What was the total number of employees determined eligible to participate in telework under the Act's requirements and any additional agency/ policy as of September 30, 2011 (or the closest date for which you have data)? _____
 - If you are unable to provide a number please describe why:

- 7) The last bulleted parameter given in the definition of eligibility to participate assumes agencies may have criteria in addition to those listed in the Act for disqualifying employees from telework. As of September 30, 2011, does your agency use additional criteria for disqualifying an employee from telework?
 - Yes

- No. Our agency does not use additional criteria (e.g., you use only the criteria for eligibility and participation outlined in the Telework Enhancement Act)

8) The Telework Enhancement Act requires that all employees should have been notified of their eligibility to telework by June 7, 2011. This means that every employee in your agency should have been notified of their eligibility – *both eligible and ineligible employees*.

Have all agency employees been notified of their eligibility to participate in telework?

- Yes
- No
- We are in the process of notifying employees of their telework eligibility
- Other. Please describe: _____

[Ask 8a if R answered Yes to 8]

8 a. If yes, how were they notified? Mark all that apply.

- All eligible employees were notified via a general, mass or agency-wide email
- Each employee was notified of his or her eligibility via personal communication (e.g., email, conversation with supervisor)
- Other. Please describe _____

9) Do you currently notify newly hired employees of their eligibility to telework?

- Yes
- No
- Other

[Ask 9a if R answered Yes to 9]

9 a. If you answered yes, how are new employees notified of their eligibility to telework? Please describe: _____

10) How many agency employees in total have a telework agreement with their managers?

_____ (Number)

If you are unable to provide a number of telework agreements, please describe why:

11) When does your agency *renew* telework agreements (Mark all that apply)?

- Telework agreements are updated according to a fixed schedule (e.g., annually with the employee performance review period)
- Telework agreements are updated when there is a change in supervisor

- Telework agreements are updated when a position change occurs for the employee (e.g., a new position in the same agency, employee goes on detail)
- Other. Please describe: _____

12) Does your agency/ track the number of employees whose telework agreements are officially denied? If yes, please provide the number of denials *since June 7, 2011*.

- Yes _____ (number)
- No
- Other. Please describe: _____

13) If you answered yes to question 12 and your agency *does* maintain records of telework agreement denials, how many were based on (report a number for all that apply):

- Type of Work (e.g., handles secure materials/documents, performs on-site activities exclusively)
- Performance
- Conduct
- Other. Please describe: _____

Note: Use only one category for each denial; the sum of the numbers in the categories above should equal the reported total of denials.

Telework Frequency

14) Consider the month of September 2011 (or the closest 4 week period for which you have data available). How many employees teleworked during this time period?
 _____(number)

15) Again considering the month of September, how many employees teleworked on a routine basis? Prior data calls have specified pay period, but, because this may be 4 weeks for some agencies, we ask you to consider a *typical* two week period in September.

3 or more days during a two week period _____ (number)
 2 days during a two week period _____ (number) 1 day during a two week period
 _____ (number)

15a) Some employees may telework routinely, but less frequently than every two weeks. In your agency, how many employees telework routinely once per month?

- _____ (number)
- Not available

16) How many employees have teleworked on a situational basis during the same two week September data collection period used above?

- _____ (number)
- Our agency does not maintain any records of situational telework.
- Other. Please describe: _____

17) How many employees have conducted mobile work during the same two week data collection period specified above?

Note: mobile workers should *not* have been included in your count of teleworkers, routine or situational.

- _____ (number)
- Our agency does not maintain any records of mobile work.
- Other. Please describe: _____

18) Please describe which *pay periods/time period* you used to calculate your answers in Question 14 through 17: _____

19) When calculating the *number of days* teleworked, is it the usual practice in your agency or sub-agency to include:

- Employees who only work full work days from an alternative location
- Employees who work any part of a work day from an alternative location
- Other. Please describe: _____

20) How did you determine the number of teleworkers reported in questions above? (Mark all that apply.)

- Tracked telework through a time and attendance system
- Used a customized telework electronic tracking system
- Other. Please describe: _____

[Stop here for sub-agencies, continue to next section for agencies]

Policy and Program Implementation

21) What is the current status of the agency telework policy currently in place as of September 30, 2011? If you have policies for each component, division and so on, please respond to this question thinking only of the broadest agency policy.

- We have a policy in place and it has been revised and approved to include requirements in the Act (e.g., written telework agreements).
- We have a policy in place but it does not include the Act requirements and we are currently working to update it to incorporate elements of the Act not already included.

- We do not have a telework policy in place, but a policy is being developed.
- Other. Please describe: _____

22) As of this data call, what percent of your agency provides training to *managers* by any of the following (the total of all responses should equal 100%):

_____ % Customized, in-person telework training developed in house and provided by the agency _____ % Customized web-based telework training developed in house and provided by the agency

_____ % Web-based training posted on OPM's telework website (www.telework.gov) _____ % Agency contracts with a vendor to develop and/or provide telework training (Web-based or in-person training)

_____ % Training through OPM's Eastern Management Development Center/Western Management Development Center

_____ % Training through the USDA graduate school (a four-hour course currently titled: "Telework: A Manager's Perspective.")

_____ % Training provided through other sources.

Please identify the percent and other training: _____

23) As of this data call, what percent of your agency provides training to *employees* by any of the following (the total of all responses should equal 100%):

_____ % Customized in-person telework training developed in house and provided by the agency _____ % Customized web-based telework training developed in house and provided by the agency _____ % Agency contracts with a vendor to develop and/or provide telework training (e.g., web-based or in-person training)

_____ % Web-based training posted on OPM's telework website (www.telework.gov)

_____ % Training provided through other sources.

Please identify the percent and other training: _____

24) How many employees, including managers, have received some form of training in telework (e.g., your agency training, OPM web-based training) since the implementation of the Telework Enhancement Act on December 9, 2010?

- _____ (number)
- Our data collection method does not allow us to separately identify those who were trained since December 2010 from the total number of employees trained in telework.
- We do not maintain records of telework training.
- Other. Please describe: _____

25) If you gave a number in response to the previous question (24), please describe how your agency verifies completion of training for telework: _____

Telework Goals

26) The Telework Enhancement Act requires each agency to establish an "agency goal for increasing telework participation to the extent practicable or necessary for the next reporting period".

What is your telework goal for fiscal year 2012? That is, what is the number and the percentage of employees the head of your agency expects to telework during the next fiscal year?

- Goal number of employees teleworking _____(number)
- Goal percentage of employees teleworking _____(percentage)
- We have not set a telework goal for 2012.
- Other. Please describe: _____

a) If your agency has not yet established a telework goal, please describe what has prevented you from doing so and the plans your agency has for establishing a participation goal: _____

We are also interested in learning more about how telework fits into other agency goals (e.g., strategic staffing). Particularly, we'd like to know more about how agencies are using telework to further these goals and any observed progress, either in terms of measurable results or anecdotal evidence.

27) Does your agency currently have plans to use telework to further any of the following goals:

a. Employee recruitment?

- Yes
- No

[show if R answers yes to above] If yes, please describe how your agency does or plans to use telework to achieve this goal and any plans for measuring this achievement: _____

b. Employee retention?

- Yes
- No

[show if R answers yes to above] If yes, please describe how your agency does or plans to use telework to achieve this goal and any plans for measuring this achievement: _____

c. Improved employee performance?

- Yes
- No

[show if R answers yes to above] If yes, please describe how your agency does or plans to use telework to achieve this goal and any plans for measuring this achievement: _____

d. Improved employee attitudes (e.g., job satisfaction)?

- Yes
- No

[show if R answers yes to above] If yes, please describe how your agency does or plans to use telework to achieve this goal and any plans for measuring this achievement: _____

e. Emergency preparedness?

- Yes
- No

[show if R answers yes to above] If yes, please describe how your agency does or plans to use telework to achieve this goal and any plans for measuring this achievement: _____

f. Reduced energy use?

- Yes
- No

[show if R answers yes to above] If yes, please describe how your agency does or plans to use telework to achieve this goal and any plans for measuring this achievement: _____

g. Reduced/avoided real estate costs?

- Yes
- No

[show if R answers yes to above] If yes, please describe how your agency does or plans to use telework to achieve this goal and any plans for measuring this achievement: _____

h. Reduced commuter miles?

- Yes
- No

[show if R answers yes to above] If yes, please describe how your agency does or plans to use telework to achieve this goal and any plans for measuring this achievement: _____

i. Others? Please describe any *additional* goals that your agency either does or plans to use telework to further: _____

If your agency has identified *additional* telework goals, please describe how your agency either does or plans to use telework to achieve these goals and any plans for measuring these achievements: _____

28) Since June 2011, has your agency achieved *cost savings* from implementing or maintaining telework in any of the following? (Mark all that apply)

- Rent, office space
- Utilities
- Human capital (e.g., recruitment, retention)
- Training
- Reduced employee absences
- Planning is underway for assessing our cost savings
- Other: (Please identify)_____

a) Please describe how you have assessed and/or verified any identified cost savings:

Telework and the Agency's Emergency Plans

The following questions refer to your agency's emergency plans. In particular they ask how your agency incorporates telework into its emergency plans. As described in meetings prior to administration of the data call, you may want to consult with your emergency preparedness staff when responding to the items.

Emergency plans are intended to continue operations during emergency situations, adverse weather conditions, natural disasters or other incidents causing disruptions of Government operations. Examples of emergency plans include Continuity of Operations Plans and Pandemic Influenza Plans.

29) At the time of this data call, how does your agency incorporate telework into its emergency plans?

a. The agency Continuity of Operations Plan specifically addresses telework.

- Yes
- No
- Agency does not have a Continuity of Operations Plan.

b. The agency Pandemic Influenza Plan specifically addresses telework.

- Yes
- No
- Agency does not have a Pandemic Influenza Plan.

c. Our agency's telework policy includes information regarding *telework during emergencies* (e.g., who is supposed to telework, the use of telework as a tool in case of emergencies).

- Yes
- No
- Other. Please describe: _____

d. Teleworkers in our agency are given specific training about what is expected of them in an emergency.

- Yes
- No
- Other. Please describe: _____

[Ask if R answers yes to d] If yes, describe how teleworkers are trained to know what is expected of them in an emergency: _____

e. Does your agency conduct telework exercises to encourage employees to gain experience with teleworking in an emergency?

- Yes, for all employees
- Yes, for those employees required to telework during emergencies only
- No
- Not able to find this information
- Other. Please describe: _____

[Ask 29ei and 29eii if R answers "yes, for all employees" or "yes, for those employees required to telework during emergencies only."]

i. are these exercises intended primarily as part of emergency planning?

- Yes
- No

ii. what was the date of your last telework exercise?

- _____(MM/YYYY)
- We are unable to provide a date

f. Please describe any other ways your agency incorporates telework in its emergency plans: _____

Technology

30) Which of the following best describes how the *majority* of teleworkers in your agency gain access to work-related equipment to telework?

- Agency provides/purchases ALL work-related equipment used by teleworkers.
- Teleworker purchases all telework-related equipment.
- Costs are shared by the agency and teleworker.
- Other. (Please explain) _____

31) Which of the following best describes how the *majority* of teleworkers in your agency gain access to work-related services (e.g., internet) to telework?

- Agency provides/pays for ALL work-related services used by teleworkers in their home.
- Teleworker pays for all telework-related residential services.
- Costs are shared by the agency and teleworker.
- Other. (Please explain) _____

32) How frequently does your agency test its Information Technology (IT) capacity to support telework?

- The agency has *never tested* its IT capacity to support telework.
- The agency conducts tests according to a *regular schedule* (e.g., monthly, quarterly).
- We test, but there is *no fixed schedule* for testing.
- We do not test our IT capacity specifically to test our ability to support telework.
- Not able to find this information.
- Other. Please describe: _____

a. If your agency does test its IT capacity to support telework, please answer the following questions.

i) What were the general results of your latest test? Please describe: _____

ii) What was the total number of unique logins during the peak hour of telework usage?

iii) When was your IT capacity to support telework most recently tested?

Or please describe: _____

- iv) Not able to find requested information

33) Which of the following best describes your agency's policy governing telework and information security?

- Our agency has a separate, written telework information security policy
- Our agency is currently developing a separate, written telework information security policy
- Telework is covered under our agency's overall information security policy
- Other. Please describe: _____

34) In terms of the information security matters addressed, our agency's telework policy is consistent with the guidance provided by the National Institute of Standards and Technology at <http://csrc.nist.gov/telework?>

- Yes
- No
- Not sure
- Other. Please describe _____

35) How does your agency secure Personally Identifiable Information (PII) while employees are teleworking? (Mark all that apply)

- All PII information is encrypted
- All PII files are password protected
- Privileged Rules of Behavior are signed for those handling PII
- Only those with a compelling need are allowed to download PII
- Two Factor Authentication is used for remote access
- Only Government-Furnished Equipment is allowed for teleworking
- No PII, sensitive or classified information is allowed to BE REMOVED PHYSICALLY from the agency facility.
- No PII, sensitive or classified information is allowed to be TRANSMITTED ELECTRONICALLY from the agency facility.
- Other (Please explain) _____

Barriers to Telework

36) Have you identified anything in your agency that might prevent employees from actively teleworking? Describe how you have identified potential barriers and any plans your agency has for overcoming them:

37) Describe any ongoing challenges your agency faces in achieving full implementation of telework:

38) How can OPM or our partner in telework, GSA, assist your agency?

List of Agencies to Report at the Sub-agency Level

In outlining contents for the annual telework report to Congress, the Telework Enhancement Act specifies:

“(2) CONTENTS.—Each report submitted under this subsection shall include—

“(A) the degree of participation by employees of each executive agency in teleworking during the period covered by the report (and for each executive agency whose head is referred to under section 5312, the degree of participation in each bureau, division, or other major administrative unit of that agency).

Those agencies required to report at the sublevels directed in the law, and included under section 5312, are listed below:

5312. Positions at level I

- Secretary of State.
- Secretary of the Treasury.
- Secretary of Defense.
- Attorney General.
- Secretary of the Interior.
- Secretary of Agriculture.
- Secretary of Commerce.
- Secretary of Labor.
- Secretary of Health and Human Services.
- Secretary of Housing and Urban Development.
- Secretary of Transportation.
- United States Trade Representative.
- Secretary of Energy.
- Secretary of Education.
- Secretary of Veterans Affairs.
- Secretary of Homeland Security.
- Director of the Office of Management and Budget.
- Commissioner of Social Security, Social Security Administration.
- Director of National Drug Control Policy.
- Chairman, Board of Governors of the Federal Reserve System.
- Director of National Intelligence.

Appendix 7: Agency Telework Participation Goals Reported in the 2011 Telework Call for Data

Agencies with numeric or percentage goals for number of teleworkers

Agency	Goal
Agency for International Development	10% increase
Committee for Purchase from People Who Are Blind or Severely Disabled	94%
Commodity Futures Trading Commission	35%
Defense Nuclear Facilities Safety Board	50%
Department of Agriculture	45% of eligible employees
Department of Commerce	10% increase
Department of Energy	20%
Department of Health and Human Services	14%
Department of Homeland Security	15%
Department of Housing and Urban Development	50%
Department of State	30% of State's domestic population who desire to telework and are in Telework eligible positions
Department of Transportation	50% of eligible employees (for majority of agency)
Environmental Protection Agency	10%
Executive Office of the President(Science and Technology)	50%
Federal Communications Commission	60%
Federal Trade Commission	15%
Institute of Museum and Library Services	20%
International Broadcasting Bureau	24%
Japan-U.S. Friendship Commission	75% (current level)
Merit Systems Protection Board	8% increase
National Aeronautics and Space	15%

Agency	Goal
Administration	
National Archives and Records Administration	15% of eligible employees
National Capital Planning Commission	95%
National Endowment for the Humanities	30%
National Transportation Safety Board	2%
Nuclear Regulatory Commission	51%
Office of National Drug Control Policy	100%
Office of Personnel Management	30%
Office of the United States Trade Representative (EOP)	20%
Pension Benefit Guaranty Corporation	50%
Securities and Exchange Commission	34%
U.S. International Trade Commission	45%
United States Holocaust Memorial Museum	58%
Department of Interior	8400 employees, 11.1%
Department of Labor	4000 employees, 25%
Department of Treasury	1195 employees, 1% increase
Inter-American Foundation	43 employees, 100%
Selective Service System	41 employees, 30%
Office of the Fed Coordinator for Alaska Natural Gas Trans Projects	6 employees
Patent and Trademark Office	7078 employees
Court Services and Offender Supervision Agency	450 employees

Non-numerical and other responses received regarding participation goals

Agency	Other responses
Central Intelligence Agency	Due to the classified nature of our mission, most employees are not eligible to telework therefore telework agreements are approved on a case by case basis.
Department of Defense	Based on the size and diversity of the Department, we have selected a very conservative goal until we have a baseline of telework accomplished in 2012 once the requirements of the Act are fully implemented. A more ambitious goal is feasible in 2013 with a solid data baseline.
Department of Justice	Additionally, goals are to promote telework from the Attorney General level. Improve technology to ensure telework capability. Encourage telework buy in from leadership. Develop surveys to detect deficiencies.
Department of Veterans Affairs	We are working to establish 2012 goals based on current data.
Farm Credit Administration	100% of all FCA employees complete telework agreements and are eligible to telework with supervisory approval. Approximately 42% of employees participate in the telework program in a routine or situational manner.
Federal Election Commission	Develop measures on how to assess cost savings of Telework program.
Federal Energy Regulatory Commission	Increase telework participation without diminishing overall Commission performance.
Federal Maritime Commission	The FMC is a small agency and is comfortable with its current level of 54% of employees having a telework agreement in place.
Federal Mine Safety and Health Review Commission	The agency is currently working on our performance goals, including telework.
General Services Administration	GSA determined that organizations would be more aggressive in implementing telework without the imposition of specific participation goals.

Agency	Other responses
Millennium Challenge Corporation	100% of all employees should have at least a situational telework agreement in place.
National Council on Disability	NCD's goal for increasing telework participation is to utilize telework options to improve the recruitment and retention of high-quality employees through enhancements to the employees' quality of life and increase efforts to employ and accommodate people with disabilities, including employees who have temporary or continuing health problems, or who might otherwise have to retire on disability.
National Mediation Board	All eligible employees are allowed to telework
National Science Foundation	<p>Currently 70% of NSF employees have approved telework agreements on file. Over the next year, we expect an increase to at least 75%. Our lack of a system for tracking actual days teleworked has prevented us from establishing a solid baseline from which to establish an aggressive goal for employees "teleworking". Steps that we are taking to reach this goal, include but are not limited to, the following: 1) Hiring a permanent Telework Managing Officer (TMO), 2) Implementing an electronic system for the development, approval, and tracking of telework agreements, 3) Implementing WebTA (a new time and attendance system) which will allow us to track actual telework days by individual and by division and directorates within the agency; and 4) Completing an ongoing telework pilot that will provide information on the successes and challenges of telework at NSF. The TMO will then be able to establish a baseline and work with senior management to set goals for employees teleworking at NSF. In addition, efforts have already begun for reaching out to division and directorate employees and managers on topics surrounding telework through presentations, brown bags, and news articles to all staff. We expect as a result of ongoing outreach and the full-time attention of the TMO we will increase our ability to move forward with a robust telework</p>

Agency	Other responses
	program.
Nuclear Waste Technical Review Board	100% of our employees already are able or regularly telework.
Office of Management and Budget (EOP)	We have not set a telework participation goal for 2012 as our 2011 pilot is still underway. We plan to review our data to establish a baseline and set a goal. During this pilot period, surveys were distributed to staff and managers to obtain feedback on the telework policy and implementation process. Three focus groups were formed to review the data, identify best practices and solutions and recommend policy changes to senior leadership.
Peace Corps	The Agency has identified barriers to telework such as culture, manager support, work conditions, technology and security issues and is implementing strategies to address the barriers. In the second quarter of 2012, we will, on the basis of our barrier analysis, set goals to be accomplished by the end of the fiscal year,
Small Business Administration	The goal is for 100% of all eligible employees to have an ad-hoc, if not any other, agreement in place.
Tennessee Valley Authority	Ensuring all teleworkers have current agreements in place

Agencies without a reported participation goal

Agencies with no reported goal
Chemical Safety and Hazard Investigation Board
Consumer Product Safety Commission
Federal Deposit Insurance Corporation
National Indian Gaming Commission
Occupational Safety and Health Review Commission
Overseas Private Investment Corporation
Postal Regulatory Commission
Appraisal Subcommittee, Federal Financial Institutions Examination Council
Corporation for National and Community Service
Department of Education
Farm Credit System Insurance Corporation
Federal Housing Finance Agency
Federal Labor Relations Authority
Federal Mediation and Conciliation Service
Federal Retirement Thrift Investment Board
International Boundary and Water Commission
Marine Mammal Commission
National Credit Union Administration
National Labor Relations Board
Office of Government Ethics
Office of Navajo and Hopi Indian Relocation
Railroad Retirement Board
Smithsonian Institute
Social Security Administration
Trade and Development Agency
U.S. Commission on Civil Rights
Woodrow Wilson Center

Appendix 8: Agency Telework Participation Numbers

Agency	Number of Employees	Number Eligible	Number with Telework Agreements	Number of Employees Teleworking in Sept.	Percentage of Eligible Employees Teleworking in Sept.	Percentage of Employees Teleworking in Sept.
Agency for International Development	3889	3889	2011	263	7%	7%
Appraisal Subcommittee, Federal Financial Institutions Examination Council	10	10	7	7	70%	70%
Central Intelligence Agency	---	---	63	15	---	---
Chemical Safety and Hazard Investigation Board	41	39	39	20	51%	49%
Committee for Purchase from People Who Are Blind or Severely Disabled	27	26	22	14	54%	52%
Commodity Futures Trading Commission	669	669	447	224	33%	33%
Consumer Product Safety Commission	550	465	298	298	64%	54%
Corporation for National and Community Service	600	600	484	250	42%	42%
Court Services and Offender Supervision Agency	1236	1108	428	330	30%	27%
Defense Nuclear Facilities Safety Board	107	80	45	36	45%	34%
Department of Agriculture	105356	77460	17928	11591	15%	11%
Department of Commerce	37729	18626	8119	5449	29%	14%
Department of Defense	793990	134477	---	36855	27%	5%
Department of Education	4629	4312	2858	1778	41%	38%
Department of Energy	14986	10001	3014	1288	13%	9%
Department of Health and Human Services	90732	47904	20957	20310	42%	22%
Department of Homeland Security	187898	56434	11196	5369	10%	3%
Department of Housing and Urban Development	8872	---	3915	3462	---	39%
Department of Interior	76329	76210	0	2747	4%	4%
Department of Justice	117179	17699	4560	2575	15%	2%
Department of Labor	15947	14668	4289	3793	26%	24%

Agency	Number of Employees	Number Eligible	Number with Telework Agreements	Number of Employees Teleworking in Sept.	Percentage of Eligible Employees Teleworking in Sept.	Percentage of Employees Teleworking in Sept.
Department of State	15231	---	3018	1049	---	7%
Department of Transportation	57990	28332	15548	4911	17%	8%
Department of Treasury	119464	49776	6608	24085	48%	20%
Department of Veterans Affairs	318546	36779	12389	4937	13%	2%
Environmental Protection Agency	17697	17559	---	3633	21%	21%
Farm Credit Administration	288	288	288	120	42%	42%
Farm Credit System Insurance Corporation	10	10	1	1	10%	10%
Federal Communications Commission	1783	1783	984	984	55%	55%
Federal Deposit Insurance Corporation	8416	8213	---	2107	26%	25%
Federal Election Commission	350	333	173	173	52%	49%
Federal Energy Regulatory Commission	1489	913	913	278	30%	19%
Federal Housing Finance Agency	519	470	93	159	34%	31%
Federal Labor Relations Authority	132	37	34	21	57%	16%
Federal Maritime Commission	126	126	68	17	13%	13%
Federal Mediation and Conciliation Service	241	228	228	5	2%	2%
Federal Mine Safety and Health Review Commission	72	72	15	25	35%	35%
Federal Retirement Thrift Investment Board	90	39	39	14	36%	16%
Federal Trade Commission	1103	1034	713	142	14%	13%
General Services Administration	12752	11573	---	6779	59%	53%
Institute of Museum and Library Services	70	65	45	40	62%	57%
Inter-American Foundation	43	43	43	7	16%	16%
International Boundary and Water Commission	267	95	5	5	5%	2%
International Broadcasting Bureau	1774	1700	432	432	25%	24%
Japan-U.S. Friendship Commission	3	3	3	3	100%	100%
Marine Mammal Commission	14	14	8	4	29%	29%

Agency	Number of Employees	Number Eligible	Number with Telework Agreements	Number of Employees Teleworking in Sept.	Percentage of Eligible Employees Teleworking in Sept.	Percentage of Employees Teleworking in Sept.
Merit Systems Protection Board	219	199	127	96	48%	44%
Millennium Challenge Corporation	288	288	95	21	7%	7%
National Aeronautics and Space Administration	18877	17438	0	5229	30%	28%
National Archives and Records Administration	3588	1040	381	397	38%	11%
National Capital Planning Commission	41	39	34	9	23%	22%
National Council on Disability	12	12	8	6	50%	50%
National Credit Union Administration	1179	412	225	97	24%	8%
National Endowment for the Humanities	164	131	0	27	21%	16%
National Indian Gaming Commission	108	105	93	39	37%	36%
National Labor Relations Board	1734	1000	219	219	22%	13%
National Mediation Board	50	31	31	24	77%	48%
National Science Foundation	1469	1465	1031	178	12%	12%
National Transportation Safety Board	413	411	290	167	41%	40%
Nuclear Regulatory Commission	3948	3948	1873	1873	47%	47%
Nuclear Waste Technical Review Board	14	12	12	7	58%	50%
Occupational Safety and Health Review Commission	58	58	22	22	38%	38%
Office of Government Ethics	74	74	26	15	20%	20%
Office of Management and Budget (EOP)	514	392	376	59	15%	11%
Office of National Drug Control Policy	102	102	23	3	3%	3%
Office of Navajo and Hopi Indian Relocation	41	40	0	0	0%	0%
Office of Personnel Management	6377	3378	2644	1021	30%	16%
Office of Science and Technology (EOP)	33	33	16	5	15%	15%
Office of the Federal Coordinator for Alaska Natural Gas Transportation Projects	11	11	10	6	55%	55%
Office of the United States Trade Representative (EOP)	234	175	68	12	7%	5%
Overseas Private Investment Corporation	215	175	173	56	32%	26%

Agency	Number of Employees	Number Eligible	Number with Telework Agreements	Number of Employees Teleworking in Sept.	Percentage of Eligible Employees Teleworking in Sept.	Percentage of Employees Teleworking in Sept.
Patent and Trademark Office	10215	8058	6668	6578	82%	64%
Peace Corps	891	860	145	47	5%	5%
Pension Benefit Guaranty Corporation	981	434	434	434	100%	44%
Postal Regulatory Commission	69	64	19	19	30%	28%
Railroad Retirement Board	953	494	176	127	26%	13%
Securities and Exchange Commission	3849	3820	2307	1217	32%	32%
Selective Service System	130	101	81	37	37%	28%
Small Business Administration	2388	1950	450	450	23%	19%
Smithsonian Institute	6000	---	311	134	---	2%
Social Security Administration	67138	---	3817	3089	---	5%
Tennessee Valley Authority	12890	12890	15	15	0%	0%
Trade and Development Agency	45	45	31	13	29%	29%
U.S. Commission on Civil Rights	35	35	11	8	23%	23%
U.S. International Trade Commission	361	361	279	138	38%	38%
United States Holocaust Memorial Museum	390	306	---	57	19%	15%
Woodrow Wilson Center	46	40	2	2	5%	4%
TOTAL	2,165,390	684,589	144,851	168,558		

Notes: Dashes indicate that data is not available. In most cases, this reflects the fact that the agency simply did not have the ability to track that particular piece of data at the time of the Data Call. For percentages calculated by OPM from agency data, the dashes indicate that the unavailability of a piece of information prevented OPM from providing the percentage.

The telework participation number for NSF is based on telework agreements for NSF teleworkers that have a set telework schedule of one day per week or more. NSF believes the actual number of staff teleworking was higher. In April of 2012 NSF is implementing a new time and attendance system that will allow it to report actual telework frequency for September 2012.

Appendix 9: Agency Telework Frequency Numbers

Agency	Number TW: 3 or more days	Number TW: 2 days	Number TW: 1 day	Number TW: Once a month	Number TW: Situational	Number of Mobile Workers
Agency for International Development	29	47	77	0	120	23
Appraisal Subcommittee, Federal Financial Institutions Examination Council	4	3	0	0	0	0
Central Intelligence Agency	14	0	1	0	---	---
Chemical Safety and Hazard Investigation Board	0	5	15	---	---	---
Committee for Purchase from People Who Are Blind or Severely Disabled	6	4	3	---	---	---
Commodity Futures Trading Commission	5	83	136	0	25	0
Consumer Product Safety Commission	128	125	0	---	---	---
Corporation for National and Community Service	25	125	100	---	---	---
Court Services and Offender Supervision Agency	42	74	134	206	---	0
Defense Nuclear Facilities Safety Board	1	21	0	---	---	0
Department of Agriculture	4250	4829	2512	---	2512	---
Department of Commerce	---	---	---	---	---	---
Department of Defense	7334	6477	9994	988	12,062	---
Department of Education	103	336	131	---	900	---
Department of Energy	114	229	184	82	617	0
Department of Health and Human Services	328	13362	13362	206	---	---
Department of Homeland Security	1133	1075	1017	1326	---	---
Department of Housing and Urban Development	1140	1347	431	49	495	---
Department of Interior	1339	1075	---	---	---	---
Department of Justice	813	1080	564	56	667	172
Department of Labor	1124	935	1061	---	---	---
Department of State	55	103	685	206	53	---
Department of Transportation	785	1987	1441	280	594	317
Department of Treasury	14221	4013	4171	373	1137	1384

Agency	Number TW: 3 or more days	Number TW: 2 days	Number TW: 1 day	Number TW: Once a month	Number TW: Situational	Number of Mobile Workers
Department of Veterans Affairs	2653	1619	---	665	---	---
Environmental Protection Agency	27	698	1560	---	892	---
Farm Credit Administration	31	41	3	---	---	---
Farm Credit System Insurance Corporation	1	0	0	1	0	0
Federal Communications Commission	16	107	356	---	---	---
Federal Deposit Insurance Corporation	123	131	303	464	---	---
Federal Election Commission	0	0	0	---	---	0
Federal Energy Regulatory Commission	111	91	0	76	---	---
Federal Housing Finance Agency	53	40	51	15	---	---
Federal Labor Relations Authority	2	5	14	---	---	---
Federal Maritime Commission	3	3	8	5	10	9
Federal Mediation and Conciliation Service	1	4	0	---	---	---
Federal Mine Safety and Health Review Commission	5	4	4	---	---	0
Federal Retirement Thrift Investment Board	1	9	2	---	---	0
Federal Trade Commission	4	7	32	---	61	---
General Services Administration	2271	1915	1828	---	---	---
Institute of Museum and Library Services	2	28	10	206	---	---
Inter-American Foundation	0	0	0	---	---	0
International Boundary and Water Commission	2	3	0	0	0	0
International Broadcasting Bureau	0	432	0	---	---	56
Japan-U.S. Friendship Commission	3	2	1	3	53	0
Marine Mammal Commission	1	1	2	2	---	0
Merit Systems Protection Board	18	52	26	---	---	---
Millennium Challenge Corporation	0	6	15	---	---	---
National Aeronautics and Space Administration	193	0	0	---	---	---
National Archives and Records Administration	72	83	62	---	---	---

Agency	Number TW: 3 or more days	Number TW: 2 days	Number TW: 1 day	Number TW: Once a month	Number TW: Situational	Number of Mobile Workers
National Capital Planning Commission	0	0	4	1	4	0
National Council on Disability	0	2	4	1	1	---
National Credit Union Administration	49	4	2	---	20	769
National Endowment for the Humanities	4	13	7	---	2	1
National Indian Gaming Commission	23	15	1	---	---	---
National Labor Relations Board	30	87	102	33	---	---
National Mediation Board	5	8	6	9	---	---
National Science Foundation	35	143	---	---	---	---
National Transportation Safety Board	73	39	55	0	---	---
Nuclear Regulatory Commission	246	252	196	114	1003	---
Nuclear Waste Technical Review Board	3	1	2	---	---	---
Occupational Safety and Health Review Commission	0	21	0	0	53	0
Office of Government Ethics	4	9	2	0	---	---
Office of Management and Budget (EOP)	4	15	36	---	---	0
Office of National Drug Control Policy	0	0	3	---	---	---
Office of Navajo and Hopi Indian Relocation	0	0	0	0	0	0
Office of Personnel Management	479	145	131	---	---	1462
Office of Science and Technology (EOP)	0	1	0	1	4	---
Office of the Federal Coordinator for Alaska Natural Gas Transportation Projects	0	6	0	6	53	---
Office of the United States Trade Representative (EOP)	0	0	0	---	---	---
Overseas Private Investment Corporation	4	7	5	---	31	---
Patent and Trademark Office	4465	2113	0	---	90	---
Peace Corps	---	---	---	---	---	---
Pension Benefit Guaranty Corporation	69	134	104	---	---	---
Postal Regulatory Commission	1	18	0	---	---	---
Railroad Retirement Board	104	0	10	0	---	8

Agency	Number TW: 3 or more days	Number TW: 2 days	Number TW: 1 day	Number TW: Once a month	Number TW: Situational	Number of Mobile Workers
Securities and Exchange Commission	483	324	256	---	154	---
Selective Service System	1	28	8	---	---	---
Small Business Administration	---	224	---	---	176	---
Smithsonian Institute	25	52	25	---	20	---
Social Security Administration	1307	1358	444	54	---	47
Tennessee Valley Authority	9	6	0	---	---	---
Trade and Development Agency	0	0	0	0	13	---
U.S. Commission on Civil Rights	2	1	1	---	10	---
U.S. International Trade Commission	5	5	19	---	---	0
United States Holocaust Memorial Museum	7	28	7	3	12	---
Woodrow Wilson Center	0	0	1	---	1	---
TOTAL	46,023	47,675	41,727	5,637	21,251	4,248

Notes: Dashes indicate that data is not available. In most cases, this reflects the fact that the agency simply did not have the ability to track that particular piece of data at the time of the Data Call.

Appendix 10: Sub-agency Telework Participation Numbers

Agency	Sub-agency	Number Eligible	Number with Telework Agreements	Number Teleworking in Sept.	Percentage of Eligible Employees Teleworking in Sept.
Dept. of Agriculture	Office of Inspector General	581	227	---	---
	Rural Development	4017	456	642	16%
	Food, Nutrition and Consumer Services	1342	959	645	48%
	Farm and Foreign Agriculture Services	6263	1905	996	16%
	Research, Education and Economics	6361	2371	716	11%
	Marketing and Regulatory Programs	9540	4476	1314	14%
	Departmental Administration	2562	620	877	34%
	Natural Resources and Environment	43356	5845	5845	13%
Food Safety and Inspection Service	3548	1069	556	16%	
Dept. of Commerce	National Telecommunications and Information Administration	204	39	54	26%
	National Oceanic and Atmospheric Administration	4001	4001	1578	39%
	Office of the Secretary	572	384	209	37%
	Office of the Inspector General	165	168	59	36%
	Bureau of Economic Analysis	516	95	60	12%
	National Institute of Standards and Technology	2842	---	588	21%
	International Trade Administration	1153	888	594	52%
	Economics and Statistics Administration	35	16	11	31%
	Economic Development Administration	225	60	38	17%
	Bureau of the Census	8381	2313	2134	25%
	Bureau of Industry and Security	362	71	46	13%
	National Technical Information Service	88	64	58	66%
Minority Business Development Agency	82	20	20	24%	

Agency	Sub-agency	Number Eligible	Number with Telework Agreements	Number Teleworking in Sept.	Percentage of Eligible Employees Teleworking in Sept.
Dept. of Defense	Department of Air Force	464	---	1119	---
	Department of Army	73419	---	4172	6%
	Other Department of Defense	56246	---	16219	29%
	Department of Navy	---	---	15353	---
Dept. of Education	Office of Safe and Drug-Free Schools	40	18	20	50%
	Office of Inspector General	322	120	120	37%
	Office of Communication and Outreach	119	46	7	6%
	Office of Innovation and Improvement	89	59	20	22%
	Office of Postsecondary Education	264	62	37	14%
	Office of the Chief Financial Officer	178	105	51	29%
	Office of the Chief Information Officer	135	52	38	28%
	Office of the General Counsel	98	13	10	10%
	Office of Vocational and Adult Education	87	41	34	39%
	Office for Civil Rights	570	449	229	40%
	Office of the Under Secretary	36	0	0	0%
	EDET - Office of English Language Acquisition	22	12	8	36%
	Office of Special Education and Rehabilitative Services	275	220	144	52%
	Advisory Councils and Committees	20	0	0	0%
	Office of the Deputy Secretary of Education	73	32	18	25%
	IMM Office of Secretary of Education	84	49	11	13%
	Institute of Education Sciences	199	172	94	47%
	National Assessment Governing Board	38	12	7	18%
	Office of Elementary and Secondary Education	247	58	55	22%
	Office of Management	182	119	88	48%
Office of Legislative and Congressional Affairs	16	2	0	0%	

Agency	Sub-agency	Number Eligible	Number with Telework Agreements	Number Teleworking in Sept.	Percentage of Eligible Employees Teleworking in Sept.
	Office of Planning, Evaluation and Policy Development	126	55	14	11%
	Federal Student Aid	1219	1162	706	58%
Dept. of Homeland Security	US Citizenship and Immigration Services	9088	3197	1949	21%
	US Immigration and Customs Enforcement	1883	311	208	11%
	US Secret Service	---	11	11	---
	US Coast Guard	6694	998	826	12%
	Office of the Inspector General	675	415	225	33%
	Federal Law Enforcement Training Center	51	6	7	14%
	Federal Emergency Management Agency	1534	1534	878	57%
	HQ Components	1973	1581	1243	63%
	US Customs and Border Protection	8587	2774	1684	20%
	Transportation Security Administration	5281	1298	467	9%
	National Protection and Programs Directorate	2786	566	519	19%
Dept. of Housing and Urban Development	Office of General Counsel	---	334	248	---
	Secretary and Deputy Secretary	---	10	5	---
	Public and Indian Housing	---	696	696	---
	Public Affairs	---	19	7	---
	Policy Development and Research	---	66	34	---
	Housing	---	1389	1389	---
	Government National Mortgage Association	---	45	14	---
	Field Policy and Management	---	78	78	---
	Departmental Operations and Coordination	---	41	40	---
	Departmental Equal Employment Opportunity	---	20	15	---
	Congressional and Intergovernmental Relations	---	2	2	---
	Community Planning and Development	---	397	265	---

Agency	Sub-agency	Number Eligible	Number with Telework Agreements	Number Teleworking in Sept.	Percentage of Eligible Employees Teleworking in Sept.
	Chief Procurement Officer	---	51	51	---
	Chief Information Officer	---	148	93	---
	Chief Financial Officer	---	98	55	---
	Office of the Chief Human Capital Officer	---	125	125	---
	Fair Housing and Equal Opportunity	---	310	289	---
	Office of Healthy Homes and Lead Hazard Control	---	49	41	---
	Office of Disaster Management & National Security	---	0	0	---
	Office of Sustainable Housing and Communities	---	14	7	---
	Office of Strategic Planning & Management	---	23	8	---
Dept. of Interior	US Geological Survey	9131	0	943	10%
	Office of the Solicitor	455	227	45	10%
	Office of the Secretary	2274	644	417	18%
	Office of the Inspector General	263	263	112	43%
	Office of Surface Mining	524	0	56	11%
	National Park Service	25929	---	408	2%
	National Business Center	1116	300	74	7%
	Bureau of Ocean Energy Management, Regulation and Enforcement	1180	---	80	7%
	Bureau of Reclamation	5409	1460	79	1%
	Bureau of Indian Affairs	9243	---	44	0%
	Bureau of Land Management	11154	488	175	2%
	US Fish and Wildlife Service	10237	1500	439	4%
Dept. of Justice	Office of Justice Programs	636	443	312	49%
	US Trustee Program	1120	279	279	25%
	US Marshals Service	696	0	22	3%
	Tax Division	553	79	50	9%

Agency	Sub-agency	Number Eligible	Number with Telework Agreements	Number Teleworking in Sept.	Percentage of Eligible Employees Teleworking in Sept.
	Office of the Inspector General	436	259	59	14%
	Federal Bureau of Investigation	21509	129	31	0%
	Executive Office for Immigration Review	339	143	105	31%
	Executive Office of US Attorney and Office of US Attorney	---	0	55	---
	Bureau of Prisons/Federal Prison System	956	300	300	31%
	Offices Boards and Divisions	986	662	207	21%
	Antitrust Division	725	63	59	8%
	Environment and Natural Resources Division	668	420	94	14%
	Civil Division	1330	337	306	23%
	Civil Rights Division	722	147	55	8%
	Criminal Division	923	0	10	1%
	Drug Enforcement Administration	5115	0	71	1%
	Alcohol, Tobacco, Firearms and Explosives	1985	1299	560	28%
Dept. of Labor	Office of the Assistant Secretary for Administration and Management	603	171	190	32%
	Occupational Safety and Health Administration	2004	669	520	26%
	Women's Bureau	56	19	16	29%
	Veterans Employment and Training Services	216	55	39	18%
	Office of the Solicitor	627	257	252	40%
	Office of the Secretary	51	1	1	2%
	Office of the Inspector General	416	415	114	27%
	Office of the Chief Financial Officer	88	7	18	20%
	Office of the Assistant Secretary for Policy	22	0	7	32%
	Bureau of International Labor Affairs	97	62	25	26%
	Office of Disability Employment Policy	49	9	24	49%
	Office of Administrative Law Judges	84	55	30	36%

Agency	Sub-agency	Number Eligible	Number with Telework Agreements	Number Teleworking in Sept.	Percentage of Eligible Employees Teleworking in Sept.
	Adjudicatory Boards	104	34	65	63%
	Bureau of Labor Statistics	2378	937	772	32%
	Employee Benefits Security Administration	813	192	224	28%
	Employment and Training Administration	985	373	333	34%
	Mine Safety and Health Administration	2243	206	98	4%
	Office of Public Affairs	64	25	16	25%
	Office of Federal Contract Compliance Programs	760	184	232	31%
	Office of Labor Management Standards	220	197	87	40%
	Office of Workers' Compensation Programs	1115	282	356	32%
	Wage and Hour Division	1651	139	374	23%
	Office of Congressional and Intergovernmental Affairs	22	0	0	0%
Dept. of State	The International Joint Commission: U.S. and Canada	---	---	---	---
Dept. of Transportation	Federal Motor Carrier Safety Administration	750	422	422	56%
	Office of Inspector General	443	464	132	30%
	St. Lawrence Seaway Development Corporation	31	31	14	45%
	Research and Innovative Technology Administration	680	648	368	54%
	Surface Transportation Board	131	104	78	60%
	Pipeline/Hazardous Materials Safety Administration	450	438	220	49%
	Office of Secretary of Transportation	535	535	98	18%
	National Highway Traffic Safety Administration	565	565	175	31%
	Maritime Administration	523	333	98	19%
	Federal Railroad Administration	866	866	497	57%
	Federal Highway Administration	2578	2578	845	33%
	Federal Aviation Administration	20235	8394	1721	9%
Federal Transit Administration	545	243	243	45%	

Agency	Sub-agency	Number Eligible	Number with Telework Agreements	Number Teleworking in Sept.	Percentage of Eligible Employees Teleworking in Sept.
Dept. of Treasury	Office of Inspector General for Tax Administration	805	762	805	100%
	Internal Revenue Service	40473	0	20767	51%
	Office of Inspector General	176	129	57	32%
	Office of Comptroller of Currency	3697	3324	1005	27%
	Financial Crimes Enforcement Network	303	195	77	25%
	Departmental Offices	802	773	321	40%
	Bureau of Public Debt	1123	320	230	20%
	Bureau of Engraving and Printing	473	241	151	32%
	Alcohol and Tobacco Tax and Trade Bureau	6	395	345	---
	Financial Management Service	1292	226	226	17%
US Mint	474	120	91	19%	

Notes: Dashes indicate that data is not available. In most cases, this reflects the fact that the agency simply did not have the ability to track that particular piece of data at the time of the Data Call. For percentages calculated by OPM from agency data, the dashes indicate that the unavailability of a piece of information prevented OPM from providing the percentage.

Sub-agency data will not typically sum up to the totals found in the agency participation data tables. This is because in most cases the list of sub-agencies does not necessarily encompass the entire organization, thus this does not reflect an error.

The Department of Health and Human Services did not provide participation data by sub-agency during the reporting period.

Appendix 11: Sub-agency Telework Frequency Numbers

Agency	Sub-agency	Number TW: 3 or more days	Number TW: 2 days	Number TW: 1 day	Number TW: Once a month	Number TW: Situational	Number of Mobile Workers
Dept. of Agriculture	Office of Inspector General	---	---	---	---	219	---
	Rural Development	295	310	37	---	---	---
	Food, Nutrition and Consumer Services	430	176	39	---	---	---
	Farm and Foreign Agriculture Services	407	523	66	---	66	---
	Research, Education and Economics	287	301	128	---	53	---
	Marketing and Regulatory Programs	636	614	64	---	53	---
	Departmental Administration	327	413	137	---	137	---
	Natural Resources and Environment	1670	2262	1913	---	53	---
	Food Safety and Inspection Service	198	230	128	---	53	---
Dept. of Commerce	National Telecommunications and Information Administration	---	---	---	---	---	---
	National Oceanic and Atmospheric Administration	---	---	---	---	---	---
	Office of the Secretary	---	---	---	---	---	---
	Office of the Inspector General	---	---	---	---	---	---
	Bureau of Economic Analysis	---	---	---	---	---	0
	National Institute of Standards and Technology	---	---	---	---	---	---
	International Trade Administration	---	---	---	---	---	---
	Economics and Statistics Administration	---	---	---	---	---	---
	Economic Development Administration	---	---	---	---	---	---
	Bureau of the Census	---	---	---	---	---	---
	Bureau of Industry and Security	---	---	---	---	---	---
	National Technical Information Service	---	---	---	---	---	0
	Minority Business Development Agency	---	---	---	---	---	0
Dept. of Defense	Department of Air Force	336	83	135	---	---	---
	Department of Army	944	1181	779	---	1268	615

Agency	Sub-agency	Number TW: 3 or more days	Number TW: 2 days	Number TW: 1 day	Number TW: Once a month	Number TW: Situational	Number of Mobile Workers
	Other Department of Defense	4854	4313	1635	988	4429	---
	Department of Navy	1200	900	7435	---	5800	---
Dept. of Education	Office of Safe and Drug-Free Schools	3	9	3	---	2	---
	Office of Inspector General	50	17	3	---	26	---
	Office of Communication and Outreach	0	3	0	---	3	---
	Office of Innovation and Improvement	1	7	1	---	8	---
	Office of Postsecondary Education	2	14	4	---	10	---
	Office of the Chief Financial Officer	3	11	4	---	26	---
	Office of the Chief Information Officer	1	3	1	---	23	---
	Office of the General Counsel	0	6	3	---	1	---
	Office of Vocational and Adult Education	6	10	3	---	8	---
	Office for Civil Rights	0	17	17	---	162	---
	Office of the Under Secretary	0	0	0	---	---	---
	EDET-Office of English Language Acquisition	1	0	0	---	5	---
	Office of Special Education and Rehabilitative Services	5	93	23	---	16	---
	Advisory Councils and Committees	0	0	0	---	---	---
	Office of the Deputy Secretary of Education	0	8	2	---	8	---
	IMM Office of Secretary of Education	0	1	0	---	8	---
	Institute of Education Sciences	4	19	3	---	61	---
	National Assessment Governing Board	0	3	3	---	---	---
	Office of Elementary and Secondary Education	1	6	1	---	38	---
	Office of Management	7	31	16	---	28	---
Office of Legislative and Congressional Affairs	0	0	0	---	---	---	
Office of Planning, Evaluation and Policy Development	4	3	2	---	5	---	
Federal Student Aid	21	83	34	---	462	---	
Dept. of	US Citizenship and Immigration Services	836	142	186	---	---	---

Agency	Sub-agency	Number TW: 3 or more days	Number TW: 2 days	Number TW: 1 day	Number TW: Once a month	Number TW: Situational	Number of Mobile Workers
Homeland Security	US Immigration and Customs Enforcement	80	91	37	---	12	---
	US Secret Service	7	4	---	---	---	---
	US Coast Guard	121	126	184	---	---	---
	Office of the Inspector General	79	47	99	---	---	---
	Federal Law Enforcement Training Center	2	2	0	---	---	---
	Federal Emergency Management Agency	148	134	228	1326	---	---
	HQ Components	307	233	278	---	---	---
	US Customs and Border Protection	74	592	0	1	203	---
	Transportation Security Administration	125	61	97	---	---	---
	National Protection and Programs Directorate	30	85	166	---	---	---
Dept. of Housing and Urban Development	Office of General Counsel	23	62	104	---	59	---
	Secretary and Deputy Secretary	0	4	1	---	0	---
	Public and Indian Housing	124	286	138	12	136	---
	Public Affairs	7	0	0	---	0	---
	Policy Development and Research	7	23	2	0	2	---
	Housing	618	494	68	23	186	---
	Government National Mortgage Association	3	5	5	0	1	---
	Field Policy and Management	18	32	8	0	20	---
	Departmental Operations and Coordination	15	22	0	0	3	---
	Departmental Equal Employment Opportunity	1	3	6	2	3	---
	Congressional and Intergovernmental Relations	0	2	0	0	0	---
	Community Planning and Development	142	118	5	0	0	---
	Chief Procurement Officer	0	31	2	0	18	---
	Chief Information Officer	17	45	25	0	6	---
Chief Financial Officer	12	21	22	0	0	---	
Office of the Chief Human Capital Officer	34	46	4	0	41	---	

Agency	Sub-agency	Number TW: 3 or more days	Number TW: 2 days	Number TW: 1 day	Number TW: Once a month	Number TW: Situational	Number of Mobile Workers
	Fair Housing and Equal Opportunity	118	112	39	10	10	---
	Office of Healthy Homes and Lead Hazard Control	1	40	0	0	0	---
	Office of Disaster Management & National Security	0	0	0	0	0	---
	Office of Sustainable Housing and Communities	0	0	2	2	3	---
	Office of Strategic Planning & Management	0	1	0	0	7	---
Dept. of Interior	US Geological Survey	130	451	362	---	---	---
	Office of the Solicitor	23	22	0	---	---	---
	Office of the Secretary	34	280	69	---	34	---
	Office of the Inspector General	47	26	39	---	9	0
	Office of Surface Mining	40	9	5	---	5	---
	National Park Service	193	159	229	7	229	---
	National Business Center	11	30	1	---	32	---
	Bureau of Ocean Energy Management, Regulation and Enforcement	---	32	---	---	---	0
	Bureau of Reclamation	42	6	31	31	---	---
	Bureau of Indian Affairs	2	12	27	---	---	---
	Bureau of Land Management	46	108	0	---	629	---
	US Fish and Wildlife Service	111	107	120	17	---	945
Dept. of Justice	Office of Justice Programs	100	90	56	0	30	---
	US Trustee Program	0	279	0	0	---	---
	US Marshals Service	17	22	13	---	---	---
	Tax Division	1	16	15	---	18	120
	Office of the Inspector General	8	12	39	0	49	0
	Federal Bureau of Investigation	10	11	10	10	8	5
	Executive Office for Immigration Review	89	15	1	0	2	25
	Executive Office of US Attorney and Office of US Attorney	25	16	14	---	---	---
	Bureau of Prisons/Federal Prison System	1	3	1	---	0	---

Agency	Sub-agency	Number TW: 3 or more days	Number TW: 2 days	Number TW: 1 day	Number TW: Once a month	Number TW: Situational	Number of Mobile Workers
	Offices Boards and Divisions	30	40	71	15	51	22
	Antitrust Division	3	3	37	3	13	---
	Environment and Natural Resources Division	2	66	28	---	28	---
	Civil Division	0	306	0	---	31	0
	Civil Rights Division	30	18	7	---	11	---
	Criminal Division	4	0	0	---	4	---
	Drug Enforcement Administration	26	33	0	---	12	---
	Alcohol, Tobacco, Firearms and Explosives	467	150	272	---	---	2558
Dept. of Labor	Office of the Assistant Secretary for Administration and Management	58	43	63	---	---	---
	Occupational Safety and Health Administration	150	94	157	---	---	---
	Women's Bureau	5	3	5	---	---	---
	Veterans Employment and Training Services	8	10	16	---	---	---
	Office of the Solicitor	63	64	74	---	---	---
	Office of the Secretary	0	0	1	---	---	---
	Office of the Inspector General	37	27	32	---	---	---
	Office of the Chief Financial Officer	2	1	10	---	---	---
	Office of the Assistant Secretary for Policy	3	0	2	---	---	---
	Bureau of International Labor Affairs	1	6	9	---	---	---
	Office of Disability Employment Policy	6	4	8	---	---	---
	Office of Administrative Law Judges	4	14	7	---	---	---
	Adjudicatory Boards	25	19	12	---	---	---
	Bureau of Labor Statistics	249	200	206	---	---	---
	Employee Benefits Security Administration	81	48	52	---	---	---
	Employment and Training Administration	82	88	100	---	---	---
	Mine Safety and Health Administration	27	30	28	---	---	---
	Office of Public Affairs	1	5	6	---	---	---

Agency	Sub-agency	Number TW: 3 or more days	Number TW: 2 days	Number TW: 1 day	Number TW: Once a month	Number TW: Situational	Number of Mobile Workers
	Office of Federal Contract Compliance Programs	62	38	77	---	---	---
	Office of Labor Management Standards	32	15	17	---	---	---
	Office of Workers' Compensation Programs	57	161	100	---	---	---
	Wage and Hour Division	171	65	79	---	---	---
	Office of Congressional and Intergovernmental Affairs	0	0	0	---	---	---
Dept. of State	The International Joint Commission: U.S. and Canada	---	---	---	1	1	---
Dept. of Transportation	Federal Motor Carrier Safety Administration	66	270	86	---	---	---
	Office of Inspector General	2	17	65	65	---	0
	St. Lawrence Seaway Development Corporation	2	5	5	5	10	---
	Research and Innovative Technology Administration	27	133	114	74	---	---
	Surface Transportation Board	8	45	15	---	---	0
	Pipeline/Hazardous Materials Safety Administration	1	82	55	---	---	27
	Office of Secretary of Transportation	45	24	13	16	8	0
	National Highway Traffic Safety Administration	25	69	80	1	1	0
	Maritime Administration	10	80	8	---	---	0
	Federal Railroad Administration	186	83	82	119	27	290
	Federal Highway Administration	150	170	157	0	373	---
	Federal Aviation Administration	238	925	627	---	---	---
Federal Transit Administration	25	84	134	---	---	---	
Dept. of Treasury	Office of Inspector General for Tax Administration	382	0	0	322	322	---
	Internal Revenue Service	13338	3682	3747	---	---	---
	Office of Inspector General	4	7	11	---	16	0
	Office of Comptroller of Currency	10	35	111	337	512	1384
	Financial Crimes Enforcement Network	15	15	4	0	31	---
	Departmental Offices	40	96	0	---	185	---
	Bureau of Public Debt	91	67	55	0	---	0

Agency	Sub-agency	Number TW: 3 or more days	Number TW: 2 days	Number TW: 1 day	Number TW: Once a month	Number TW: Situational	Number of Mobile Workers
	Bureau of Engraving and Printing	23	37	51	19	15	---
	Alcohol and Tobacco Tax and Trade Bureau	268	29	2	0	46	---
	Financial Management Service	23	21	131	0	---	---
	US Mint	14	38	39	---	---	0

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The Department of Health and Human Services did not provide frequency data by sub-agency during the reporting period.

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