



JDB Associates, LTD
Alexandria, Virginia



telework!va
Pilot Program
Final Report

Summary

JDB Associates, Ltd is a small firm located in Alexandria, VA. They broker overseas 4 and 5 star hotels to American travel agencies. Prior to joining Telwork!VA they had 20 employees in a call center environment that will not accommodate any more people, so they wanted to implement Telework as a means of accomplishing this while improving recruitment and retention. They had no experience with Telework and required assistance in developing a policy, identifying any technical issues and/or concerns, and providing training.

JDB began working with Strategic Transportation Initiatives, Inc., a telework consulting firm in the summer of 2002. After moving into its new building, JDB launched its TeleworkVA! program in November 2002. Before moving to their new headquarters, a historic townhouse next door to the existing facility, the firm's employees were 'elbow-to-elbow' on telephones booking travel and learning about hotel clients across the globe. JDB was in the process of purchasing a software based PBX to alleviate some of the daily challenges each of the agents encountered. The new system would allow tracking and holding calls; and monitor the work-flow. This would be especially critical since JDB had decided to implement telework as a new and best business practice. Their lease had expired and they were cramped for space. Telework seemed like a great idea. They would be gaining a fair amount of space by moving to their new headquarters. However, JDB's goal was to double the amount of agents and employ a space reduction plan that would make their new space management realistic. Telework became the solution to their challenge.

From the summer through the fall, JDB worked with the consultant to prepare templates to assist in telework program implementation including company telework policies. The templates were packaged as JDB's Telework Portfolio. Program roll-out has continued up to the writing of the final report and the end of the two-year pilot program.

When the pilot program began the firm had 16 employees, three of whom teleworked, including the Owner/Founder, Judy Baer. Charles Tylander, JDB's business consultant, expected the number of participants to "easily double" by the end of the two-year pilot program.

JDB started its program for various reasons:

- Teleworking would help the company optimize its staffing.
- Parking around JDB's Old Town Alexandria location is both expensive and in short supply. Teleworking would help alleviate parking demand, easing the cost and hassles for the company and employees alike.

- Some of JDB's employees sought relief from the rigors & wasted time of their daily commute.
- JDB would be moving to a larger office building, but at the same time doubling their staff of agents.

As a result of the TeleworkVA! program, JDB has addressed all of these issues, and more. They have increased their staff to 31. Teleworking now is a way of life at JDB. Twenty-eight of these employees telework, seldom coming to the office. When they do, their workspace is now hoteling space and shared with other JDB teleworkers.

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JBD Associates, Ltd.

JBD Associates, Ltd. (JDB), established in 1978, is a comprehensive hotel and resort marketing organization representing only the finest properties in the upscale travel market and providing the highest level of personalized service to both client properties and their patrons. Presently, JDB represents over 135 hotels throughout Italy, 12 hotels and country houses in Ireland, 2 hotels in London, 7 Paris hotels, and 3 resorts in the Caribbean. Most are four and five-star hotels, although there are a few carefully selected three-star properties. Each has been personally selected by JDB and is evaluated based on a number of factors, including its reputation, management, location, distinctive facilities and value. JDB hotels are reviewed and visited annually to ensure maintenance of standards in their respective categories.

Program Development & Implementation

The key to JDB's positive experience with teleworking has been the installation of the Altigen PBX software system which integrates its phone and computer systems. Although the consultant does not endorse any products, it is interesting to note the functionality of the PBX software used by JDB or other companies with similar telework requirements. A description of the functions provided by the software:

The software delivers a low cost solution for telecommuters and remote agents. By implementing any of IP PBXs, a business can now support local and remote IP phones with the same extension. Using DSL or cable modem for access, businesses can increase productivity and enhance communications with their corporate office and customers by having office extensions anywhere in the world.

Up to 600 telephones can be implemented as local or remote extensions. From a user's perspective, an IP extension works exactly the same way a standard telephone extension has always worked, with the added advantage of being able to work remotely requiring just a cable modem or DSL connection. Remote teleworkers have the benefit of being an IP extension off the main phone system and can keep their current on premise extension. The software provides auto login/logout, so when a user logs in remotely, their local phone is logged out. This reverses when logged in locally. This way, the system administrator does not have to be involved in the scheduling or administration of the day-to-day teleworker support. When support is needed any phone feature can be managed and configured for local and remote phones from a central location, including pushing out new firmware.

The PBX solutions are complete turnkey IP-PBX and Converged IP phone systems that are standards-based, making it easier and more affordable for customers of all sizes to implement reliable IP-PBX telephone systems and IP contact center solutions.

Phone systems and call center solutions are designed to meet the unique needs of businesses from 8 to 600 users. Each system is designed to be cost effective for any sized business. Each system offers a highly scalable IP-PBX telephone system. The product family supports logical stepped increments of 25, 50, 100, 200, and 300 users per chassis. Every system has the ability to continue to expand by networking multiple local and remote systems together for implementation of up to 600 extensions. These exceptional scaling and networking capabilities are the hallmarks of the software Distributed Intelligence Network Architecture (DINA).

IP systems and Call Center solutions are administrated through an easy to use administrative interface. For single and multi-site businesses, the software offers affordable and complete state of the art IP telephone systems. The system includes automated attendants, superior voice mail, including one-number access "follow me", and Zoomerang® one button call back from voice mail, as well as comprehensive call detail reporting

The original cost for the upgrade to the system was broken out as follows:

| | |
|---------------------------------------|-----------|
| New telephone system: | \$ 74,000 |
| Connectivity for remote employees | \$ 16,750 |
| Upgrade central service configuration | \$ 26,700 |
| Upgrading VPN to support teleworking | \$ 7,800 |

The original equipment lease cost for home sites was estimated as follows per employee:

| | |
|--------------------------------|----------|
| Hardware | \$ 2,200 |
| Two year's communication costs | \$ 960 |

There were 12 individuals who were eligible for the TeleworkVA! program. No more than half would participate in the program.

As a call center, JDB's phone system requires employees to log in to receive a call. If a logged-in employee doesn't answer an incoming call, the system automatically logs the employee off, which affects that employee's compensation and performance rating. This technology frees JDB's supervisors from one of the common worries voiced by some employers that try telework: a loss of control or employee accountability.

JDB did not experience employee anxiety or manager/supervisor resistance largely because employees know they have to be set up and ready to receive calls whether they are in the office or teleworking. "We expect employees who telework to have a dedicated place where they can work with no interruptions," explains Tylander. "Some of our teleworkers are finding some challenges, but we're working through those with them."

Similarly, supervisors can access the system from anywhere and monitor activity and performance in real time. One of the first teleworkers was the call center manager. "They can see who's answering their phones, what calls are coming in, whether we have enough people on the phones," Tylander notes. "That helps keep their comfort level high, and their ability to work remotely helps them appreciate that they're not losing control."

JDB allows any employee to participate in the program. The caveat: "People have to be here for at least three to six months before we let them telework," Tylander adds. "That's really for training, because they don't know enough before then to be able to answer the phone themselves." This is stated in the company's telework policy.

Moreover, employees can telework a maximum of three days a week. "That way all employees are in the office part of the time, and we rotate who gets which days," says Tylander.

JDB's initial teleworkers have opted to participate out of necessity--each had situations that would not allow them to continue working without this option. "The telework program has actually let us retain valuable people instead of losing them," Tylander explains.

Are JDB's teleworkers more productive? "Some have been more, some less, some the same," observes Tylander. "Different people adjust differently. Some are still working through interruptions from family, while others get more done (at home) by getting away from office interruptions."

Challenges & Investment

JDB's biggest challenge has been setting up the phone and computer system so employees "can take it with them wherever they go," says Tylander. "We have the computer infrastructure down, but we're still fiddling with the phones a little bit." JDB invested about \$75,000 in the Altigen phone system, which distributes calls to available agents regardless of location. This investment, he hastens to add, was made for business reasons, not simply to facilitate teleworking.

"We're a call center, so our monthly phone bill is astronomical whether we telework or not," Tylander notes. He estimates JDB has invested about \$8,500 in telework-specific equipment and upgrades.

JDB provides teleworkers with most of the hardware needed for teleworking, including a secure hub, a computer and phone. Teleworkers must arrange for and pay the monthly bill on--their own home broadband connection, and provide the cable JDB will hook into the company hub. After the initial set-up, teleworkers have all the computer functionality in their home that they would have in the office. Even faxes are distributed electronically. Again, all of this is stated in JDB's telework policy.

Program Outlook

Tylander anticipates having "anywhere from two-thirds to three-quarters of our call center people teleworking. We figure it will be part of the natural way we operate." He sees teleworking as an option that helps the company and its employees manage competing demands. "There will be new people who need to be here in the office all the time, and there will be people who don't want to work at home, and that's not a requirement," he says. "One thing JDB probably won't do again for a long time," Tylander notes, thanks to its teleworking program is that: "We won't have to go out and lease new space as we expand."

Training/Focus Groups

In order to support the future of the program two training sessions and focus groups were conducted; one for managers and one for teleworkers to review JDB's policy and determine how the program was being received. Both the training sessions and the discussion guides for the groups are included in this document in the Appendix. All of the TeleworkVA! participants attended the training sessions. Eight teleworkers participated in the focus group discussions; four for managers, and four for teleworkers.

TELEWORK PORTFOLIO

The following documents were developed for JDB's Telework program.

Teleworker Home Office Procedures

Telework participants will maintain standard office procedures and will make teleworking appear invisible to other JDB Associates, Limited clients, employees and telework employees.

Teleworkers will strive to ensure that JDB Associates, Limited does not receive any negative comments from external contacts about employees working at home and that communication between teleworkers and external contacts and JDB Associates, Limited non-teleworkers is smooth.

JDB Associates, Limited teleworkers shall maintain standard office procedure with particular attention to:

- 1. Clear, consistent communication with the manager about teleworking days.**
On the day preceding a teleworking day, teleworkers will sign out and inform the Manager that they will be teleworking. The receptionist will take messages as she normally does and will send them to the teleworker using electronic mail.
- 2. Teleworkers who have access to computers with modems and have the correct communication software need to use the JDB Associates, Limited network.**
- 3. Schedule: The following schedule will apply unless changed by the teleworker and his/her supervisor.**

Days: _____ Hours: _____

I have read and understand JDB Associates, Limited's Telework Office Procedures. I agree to abide by and operate in accordance with their terms and conditions. I agree that the sole purpose of this agreement is to regulate telework and that it neither constitutes an employment contract nor an amendment to any existing contract.

Employee

Supervisor

Date

JDB Associates, Limited Telework Pilot Program Guidelines

JDB Associates, Limited has established a pilot program to examine how teleworking can contribute to organizational objectives and employee well being. This policy provides guidance for teleworkers, employees not teleworking, and management.

Purpose

Teleworking, the practice of working at home for a limited number of days instead of working in JDB Associates, Limited office, is a work alternative that JDB Associates, Limited offers to some employees when it would benefit both JDB Associates, Limited and the employee. Teleworking is not a formal employee benefit, but a work scheduling practice that helps employees balance the demands of their work and personal lives. Teleworking is a privilege, not a universal benefit or employee right.

An employee's compensation, benefits, work status, and work responsibilities will not change due to participation in the teleworking program. Teleworking employees must comply with all organizational rules, policies and procedures.

Eligibility

Candidates for teleworking must be an employee of JDB Associates, Limited with a history of satisfactory or better job performance ratings. The opportunity to telework must be approved by an employee's supervisor, who is ultimately responsible for decisions to continue or discontinue teleworking by the employee, following appropriate notification to the teleworker.

Selection of employees to participate in the Teleworking Pilot Program shall be based on specific, written, work related criteria including:

- Employee responsibilities
- Need for, and nature of, interaction with other staff and external clients
- Need for use of specialized equipment
- Availability of other qualified employees on site
- Employee job performance

Employees that are considered for teleworking must be able to work independently, be a self-starter, and demonstrate attention to work time and productivity. An employee must have a satisfactory or better performance level with no record of performance or conduct

issues. The resources that an employee needs to do his/her job must be easily transportable or available electronically.

The decision to allow an employee to telework will be made by the employee's supervisor in consultation with Human Resources.

Eligibility and suitability of employees to participate in teleworking will vary among departments and business units, depending on the function and responsibilities of the employee. Each department must maintain some minimum complement of employees who work on site at the JDB Associates, Limited office in order to function effectively.

Teleworking is not an alternative to child or elder care and, when applicable, the teleworker must make appropriate arrangements for dependent care, unless there are extreme exceptions approved by management.

Schedules and Hours

Telework hours may be different from office work hours, however, teleworkers and their supervisors must agree on the designated work hours. A regular teleworking schedule, including specific days and hours, must be established by the teleworker and approved by their supervisor. Generally, a teleworker will spend one to two days working from home with the remainder of the scheduled hours working in his/her office on JDB's premises. The amount of time the teleworker is expected to work per day or per pay period will not change due to participation in the teleworking program.

Overtime hours must be pre-approved in writing by the supervisor. Deviations from the agreed upon schedule must be approved in advance by the supervisor. JDB Associates, Limited policy will be followed for all absences. Teleworkers are responsible for keeping and submitting accurate records of their work hours.

Supervisors retain the right to require a teleworker to return to JDB Associates, Limited office on a regularly scheduled teleworking day should work situations warrant such an action. This situation is expected to be only an occasional occurrence. If a teleworker is required to return to JDB's office during regularly scheduled teleworking days frequently, the supervisor may re-evaluate the compatibility of the teleworker's position and job responsibilities with respect to teleworking or the specific teleworking schedule.

Teleworkers are required to account for all time worked in accordance with JDB Associates, Limited's timekeeping policies. It is the teleworker's responsibility to submit an accurate accounting of hours worked in a timely manner. If a teleworker is sick while working at home or uses other time off, the teleworker must report hours actually worked

on his/her timesheet and use composite leave for the remainder of the hours. Teleworkers may perform overtime work only after receiving approval from their supervisor.

Workspace

Teleworkers must have an appropriate work area in their home that considers ergonomics, equipment, adequate workspace, noise, and interruption factors. The teleworker's off-site workspace should provide an adequate work area, lighting, telephone service, power and temperature control. Additional requirements may vary, depending on the nature of the work and the equipment needed to perform the work.

JDB Associates, Limited's liability for job-related accidents will continue to exist during the approved work schedule and in the teleworker's designated work location since the teleworker's homework space is an extension of JDB Associates, Limited workspace. The designated work location must meet OSHA safety rules for the workplace including: smoke detector; working fire extinguisher; clear, unobstructed exits; removal of hazards that could cause falls; adequate electrical circuitry, and appropriate furniture. If an at-home injury occurs, the teleworker must notify his/her supervisor immediately and follow JDB Associates, Limited policy for on-the-job injury. The teleworker must agree to follow common safety practices and provide a safe work area for the employee and others who enter it.

Homeowner's insurance and any changes in rates or coverage is the responsibility of the employee. Any increase in the teleworker's home utility costs (excluding increased telephone costs) is the responsibility of the employee.

Federal and state statutory abstracts will be posted at the teleworker's JDB Associates, Limited office location in lieu of posting them in the employee's home office. Teleworkers should review these notices while on JDB Associates, Limited's premises.

Teleworkers should consult their attorney, tax advisor or accountant regarding any legal or tax implications attendant to working at their home or alternative site.

Equipment and Supplies

Office supplies will be provided by JDB Associates, Limited and should be obtained during the teleworker's in-office work period. Out-of-pocket expenses for supplies normally available in the office will not be reimbursed. Teleworkers are responsible for all supplies, equipment, and/or materials provided by JDB Associates, Limited. All items

remain property of JDB Associates, Limited and may not be used for personal or other than JDB Associates, Limited use.

JDB Associates, Limited will reimburse teleworkers for other business-related expenses that are reasonably incurred in accordance with job responsibilities and approved by the supervisor in accordance with JDB Associates, Limited regular policies. Appropriate documentation is required if such expenses are submitted for reimbursement. JDB required equipment is listed in the Appendix to this document by 'job requirements.'

JDB Associates, Limited does not assume liability for loss, damage or wear of employee owned equipment unless otherwise agreed to in writing prior to the occurrence. Maintenance, repair and replacement of JDB Associates, Limited-owned equipment issued to teleworkers are the responsibility of JDB Associates, Limited. In the event of equipment damage or malfunction, the teleworker must notify his supervisor immediately. JDB Associates, Limited reserves the right to enter the home work area for inspection of the equipment, if necessary. Repairs to employee owned equipment is the responsibility of the teleworker. In either situation, the teleworker may be asked to report to the office until the equipment is usable.

Teleworkers must take appropriate action to protect company-provided equipment from damage or theft. JDB Associates, Limited equipment must be returned to JDB Associates, Limited when an employee terminates or discontinues the teleworking arrangement.

Teleworkers may use their own equipment (e.g., fax machine, printer, photocopier) provided that no cost is incurred by JDB Associates, Limited. Repair and maintenance of employee-owned equipment is the responsibility of the teleworker.

Employee Access and Availability

Teleworkers must be available by telephone and email during scheduled hours, with the exception of their scheduled lunch period.

If it has been determined that you cannot be connected to the JDB telephone system and/or computer system, call your supervisor. You may need to return to JDB's office. If you do not follow this procedure you will not be compensated for time lost for these disruptions.

Security

It is the responsibility of the teleworker to take all precautions necessary to secure proprietary information and to prevent unauthorized access. The teleworker is required to observe all office security practices when working outside JDB Associates, Limited's office to ensure the integrity and confidentiality of proprietary information. Steps to ensure the protection of proprietary information include, but are not limited to, use of locked file cabinets, disk boxes and desks; regular password maintenance; firewall; and any other steps appropriate for the job and the environment.

Teleworkers agree to allow an authorized JDB Associates, Limited representative access to the home work area during prearranged times for business purposes as deemed necessary by the supervisor, including safety inspections, equipment installations and repairs, security assurance, retrieval of JDB Associates, Limited property, and performance evaluations. To ensure hardware and software security, all software used for teleworking must be approved by the supervisor prior to installation, and only approved bulletin board systems may be contacted. All software used for teleworking must be virus inspected and each PC must have virus protection software installed. JDB Associates, Limited owned software may not be duplicated unless authorized through the license agreement. Restricted access materials shall not be taken out of the office or accessed through the computer unless approved in advance by the supervisor.

Liability

It is the responsibility of the teleworker to maintain a safe, professional work site at home that is free from potential safety problems. Teleworkers must certify that their home is free from workplace hazards by completing a safety checklist.

In the case of an injury while working at home, teleworkers must immediately (or as soon as circumstances permit) report the injury to his/her supervisor or the Human Resources Department and request instructions for obtaining medical treatment.

Application Process

Employees wishing to telework will complete a Teleworker Selection Survey and provide information concerning job responsibilities, proposed teleworking schedule, types of work tasks and activities to be performed at the off-site work space, and description of the off-site work space and the equipment required. A decision will be made by JDB management to select employees for teleworking.

Teleworkers will be required to sign a Teleworking Agreement and complete associated documentation.

Teleworking arrangements will be on a trial basis for the first three months and may be discontinued at any time, at the request of either the teleworker or JDB Associates, Limited. If a teleworking arrangement is discontinued by JDB Associates, Limited, every effort will be made to provide notice to the employee. However, there may be instances where no notice is possible. Likewise, if an employee elects to discontinue a teleworking arrangement, the employee should provide notice to his/her supervisor.

Employees that are teleworking at the time this policy is adopted will be permitted to continue teleworking. Existing teleworkers will need to sign the Teleworking Agreement and complete the associated documentation that is required of all teleworkers.

Income Tax

It will be the teleworker's responsibility to determine any income tax implications of maintaining a home office area. The company will not provide tax guidance nor will the company assume any additional tax liabilities. Employees are encouraged to consult with a qualified tax professional to discuss income tax implications.

Evaluation

Teleworkers will participate in all studies, inquiries, reports and analyses relating to this program.

JDB Associates, Limited Telework Hardware and Software Inventory List

Employee's Name: _____

Date: _____

JDB Provided Hardware

| Hardware | Type | Serial# | Program | Version |
|-----------------|------|---------|---------|---------|
| PC | | | | |
| Monitor | | | | |
| Surge Protector | | | | |
| Hub/Firewall | | | | |
| VoIP Telephone | | | | |
| Other: | | | | |

JDB Provided Software

| Software Type | Serial# | Program | Version |
|---------------|---------|---------|---------|
| | | | |
| | | | |
| | | | |

Associate Provided Hardware

| Hardware | Type | Serial# | Program | Version |
|----------|------|---------|---------|---------|
| Modem | | | | |
| PC | | | | |
| Monitor | | | | |
| Printer | | | | |

Associate Provided Software

| Software Type | Serial# | Program | Version |
|---------------|---------|---------|---------|
| | | | |
| | | | |
| | | | |

Employee Signature: _____

Date: _____

Supervisor _____

Date: _____

Signature: _____

Outcome of the Telework Program

Today, JDB employs 31 individuals, 28 of which participate in full time teleworking. Initially, 3 employees teleworked; two in the marketing department and the owner, Judy Baer. Although the success of the program has been attributed to the IT genius of Todd Beckett, the lead in developing a foundation for the program fell with the purview of Charles Tylander, JDB consultant. In fact, one of JDB's employees just moved to Albany, New York and has been able to remain on staff through the telework program.

A recent mandate from Chris Baer, who is in charge of JDB operations, requires that all desks at the Alexandria headquarters are now hotelling stations. JDB's goal is to "transform their business. They will transform their (travel) industry" through the practice of teleworking for their call center.

The firm benefited from the technical assistance provided by the consulting group which developed templates on telework policy and other forms as part of JDB's Telework Portfolio. "TeleworkVA! allowed us (JDB) to be able to do this project. We could not have implemented or paid for the program, without it"!

The system that made the program work was designed by Antigen Software and is PBX based. Its value when purchased was \$70,000. The money offered for TeleworkVA! paid for the cost of lease equipment and consulting services. The City of Alexandria provided an additional \$8,975 to the program through its city-wide telework incentive program.

During the course of JDB's participation in the program, the following benefits were realized based on 9 responses from an on-site survey that was conducted in May 2003:

| | |
|--|-------|
| Average Telework Days Per Week for Program Participants: | 2.45 |
| Average Vehicle Occupancy: | 1.00 |
| Vehicle Trips Reduced (over 2 years of the program): | 9,800 |

It is clear from the survey results that the institution of the Telework!VA program at JDB over the two year timeframe allowed a significant amount of more employees to work from home.

The total budget spent over the course of JDB's participation in the program was \$32,900 of which \$12,900 was spent on consultant costs and \$20,000 on equipment lease reimbursements. Overall, the cost per teleworker for Telework!VA over the 24 month project period at JDB was \$1,175.00. The average cost per each trip reduced for this program was \$3.36.

Chris Baer indicated that a culture change is definitely required to have a successful company-wide telework program. Because of the nature of teleworking organic exchange is not present amongst the workers. JDB is working to rectify this situation. Information sharing is the key to overcome the lack of communication and information exchange. They are currently building an intranet for real time information and a portal for formalized information. A Chat Room will be open for employees during their business work hours where they will be able to talk about recommendations for hotels, flights, etc.

JDB remains enthusiastic about TeleworkVA! and has assumed the role of spokesperson for the Virginia-based incentive program. They are always promoting the program among their colleagues in Alexandria and Northern Virginia.

“A lot of people look at teleworking as a way to get stuff done at home while they’re working,” notes Tylander. “But the real benefit is not having a commute.” A prospective teleworker needs to understand that the work he does at the office is the same work in quantity and quality that he will be doing at home. “A teleworker needs to have an environment to be able to do that,” Tylander advises. “Still, not having to get on the Beltway is no small benefit!”

Appendix

Discussion Outline JDB Teleworkers/Managers

I. Introduction(5 min)

Welcome participants. Explain group procedures, confidentiality, and reason for taping, introduce observers. Ask respondents to introduce themselves: name, department/position/job responsibilities.

State purpose of session: to learn more about their initial telework experiences, provide feedback for improvement of the program.

1. Background (20 min)

Tell me about your telework arrangement:

- How many days do you work at home? How many days in total have you worked at home so far?
- What is your specific job? What kinds of activities do you do in the office? What activities have you done so far at home?
- How have you been keeping in touch with the office on the days you work at home? Do you call in? Use the network? Fax? Receive calls? How often do you communicate with someone at the office, on average, on the days you work at home?
- What hours have you been working at home? Are these times the same or different than the hours you work at the office? If different, why have you changed?

2. At Home (35 minutes)

Tell me a story about a typical telework day. What happens, from the time you get up in the morning to the time you complete work. Describe the early morning. The middle of the morning, just before lunchtime. Lunchtime. After lunch. Late afternoon. Evening.

How have you felt, on the days you work at home? Is the feeling different or the same as when you go into the office? What are the advantages/good things about being at home? What are the disadvantages/less good things?

So far, what do you like about teleworking? What do you dislike? What makes you say that?

Has your telework experience so far been about what you expected, or different from what you expected? What makes you say that? Should/could you have been better prepared for what to expect? In what way?

Let's talk about your workspace at home:

- Where is it?
- What equipment do you have?
- What equipment have you found you use most? Least
- Is there any equipment you have that you find you could do without? What is it?
- Is there any equipment you don't have, or didn't start out with that you find you need? What? What have you done to get what you need?
- How comfortable/workable are you finding your workspace? If you could change anything, would you? What would you change? What makes you say that?

Tell me about how other household members are reacting to your telework:

- Who else is home on the days you telework? Are they there all day, or only part of the time?
- What's a typical morning like, on telework days? How does that compare to a typical morning on going-to-the-office days? What's a typical evening like on each kind of day? *Probe:* Is your household routine different on the days you telework, compared to the days you go into the office? If so, how is it different? What has changed?
- How has teleworking changed/affected your childcare or elder care arrangements? Have you changed hours? Providers? Other arrangements? What led to the change?
- Has teleworking changed any of your other household routines or arrangements? In what ways? What led to the change? How are things working so far?

If not already mentioned: What has it been like, working at home? Have things gone smoothly? Have you encountered any problems or difficulties? What have they been?

Have you experienced any issues or difficulties on telework days relating to your interaction with household members or with others at home, like neighbors or other non-household members? What have these issues been about? What have you done to deal with them? How, if at all, could you have been better prepared to handle these issues?

3. At the Office (35 minutes)

Tell me what it's like going back to the office after a telework day:

- Is your office routine the same or different than it was before you started teleworking? If different, in what way?
- Is the work you do at the office different or the same? In what ways?
- Are your relationships and interactions different or the same? In what ways?
Probe relationships with: co-workers, supervisor, and clients/customers/other outsiders.

To supervisors: What is it like in the office on the day a teleworker is not there? Do people know the person is working from home? Do they feel free to contact that person as needed? Does having a person out of the office create any issues or challenges? What makes you say that?

Let's talk specifically about the teleworker/supervisor relationship.

For Teleworkers: How do you communicate with your supervisor about your work? Do you do anything differently now than before you started teleworking? What do you do differently? What makes you do that?

For Supervisors: How do you keep in touch with/keep tabs on teleworkers? Do you do anything differently now than before they started teleworking? What do you do differently? What methods/approaches seem to work best?

Are there things that you (teleworker or supervisor) didn't realize, or didn't expect, about the telework arrangement? Have there been issues that you have had to address? What aspects of your relationship have differed from your expectations? What makes you say that?

How has your relationship changed/been affected by telework? What are the good/positive changes? The bad/negative changes? What makes you say that?

What, if anything, could/should have been done to prepare teleworkers, supervisors or co-workers for the telework experience? What makes you say that?

Anything else you would like to add about your experience?

Training Sessions for Managers and Practitioners

JDB Associates, Ltd

Training for Teleworking

9/8/2004 Strategic Transportation Initiatives, Inc. 1

The Successful Teleworker

- Management support
- Measurable objectives & deliverables
- Understand JDB Associates, LTD policy
- Participant training
- Progress measurement
- Periodic review and adjustment

9/8/2004 Strategic Transportation Initiatives, Inc. 2

Profile of Teleworker



- Independent
- Flexible
- Self motivated
- Time management skills
- Communication and organizational skills

9/8/2004 Strategic Transportation Initiatives, Inc. 3

JDB Associates, LTD

Telework Policy

9/9/2004 Strategic Transportation Initiatives, Inc. 4

- ### JDB Associates, LTD Policy: Practice
- Working at home
 - Work scheduling practice
 - A privilege for selected employees
 - Privilege, not a right
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- ### JDB Associates, LTD Policy: Eligibility
- Satisfactory or better job performance
 - Approval of supervisor
 - Works independently
 - Self-starter
 - Good time management skills
 - Highly productive
 - Transportable resources
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JDB Associates, LTD
Policy: Selection

- ❑ Employee responsibilities
- ❑ Interaction with other staff and external clients
- ❑ Need for use of specialized equipment
- ❑ Availability of other qualified employees on site
- ❑ Employees job performance

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JDB Associates, LTD
Policy:
Schedules/Hours

- ❑ May be different from office hours
- ❑ Overtime must be pre-approved by supervisor
- ❑ Supervisors may ask teleworker to return to office on scheduled day
- ❑ Schedule number of hours per week – generally one or two

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Policy:
Schedules/Hours

- ❑ Required to account for all time worked in accordance with JDB Associates, LTD's timekeeping policies.
- ❑ If employees are sick while working at home or uses other time off, they must report hours actually worked on their timesheet.

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Policy: Appropriate Workspace

- ❑ Ergonomics
- ❑ Equipment
- ❑ Environment
- ❑ Work area
- ❑ Interruption factors
- ❑ Lighting

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Policy: Appropriate Workspace

- ❑ Telephone services
- ❑ Power & temperature control
- ❑ JDB Associates, LTD has right to inspect workspace
- ❑ Teleworker is required to provide photos of work-space at home

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Policy: Equipment/Supplies

- ❑ JDB Associates, LTD equipment approved by supervisor
- ❑ Office supplies provided by JDB Associates, LTD
- ❑ Re-imbursement for business related expenses
- ❑ JDB Associates, LTD not responsible for liability of employee owned equipment
- ❑ Employee required to bring equipment in periodically for maintenance

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Policy:
Equipment/Supplies

- ❑ JDB Associates, LTD equipment approved by supervisor
- ❑ Office supplies provided by JDB Associates, LTD
- ❑ Re-imbusement for business related expenses

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Policy:
Application Process

- ❑ Description of work space
- ❑ Sign Telework Agreement
- ❑ Three month trial basis

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Policy:
Application Process

- ❑ Description of work space
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Teleworking Considerations

- ❑ Designing your home office
- ❑ Establishing a safe and productive environment
- ❑ Organizing & managing your time

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JDB Associates, LTD

Telework Worksheets

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Worksheets

- ❑ Teleworker agreement
- ❑ Teleworker assessment tool
- ❑ Hardware/software inventory
- ❑ Office/materials check-list
- ❑ Pilot program guidelines
- ❑ Home office procedures

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Designing Your Home Office

- ❑ Office furniture
- ❑ Lighting
- ❑ Electrical power
- ❑ Appropriate technology
- ❑ Safety issues
- ❑ Cost of equipment

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Office Checklist

- ❑ Is the workspace free from excessive noise?
- ❑ Is adequate lighting (side or rear) provided at the work station?
- ❑ Is all electrical equipment free of recognized hazards that could cause physical harm (frayed wires running through walls, exposed wires fixed to the ceiling)?

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Office Checklist

- ❑ Is electrical system adequate for office equipment?
- ❑ Is electrical equipment grounded?
- ❑ Are surge protectors properly installed?

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Office Checklist

- Are aisles, doorways and doors free of obstructions to permit visibility and movement? (rugs and carpets secured to prevent slipping)
- Is there an exit that allows prompt exiting?
- Are phone lines, electrical cords and extension wires secured under a desk or along a baseboard?

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Office Checklist

- Is the office space neat and clean?
- Is a working fire extinguisher located nearby?
- Are working smoke detectors installed at the work site?
- Is the work area private and free of intrusion?

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Office Checklist

- Are files and data secure?
- Are first aid supplies readily accessible and adequate?

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Office Checklist

Is office furniture and equipment ergonomically correct?

Desk: 24"-29"
Chairs: Sturdy and adjustable (90° at knees, feet flat on floor, 15° back tilt) with backrest and casters appropriate for floor surface.
Keyboard: In line with wrist and forearm position.
Monitor: 18"-24" from eyes: top of screen slightly below eye level.

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Office Checklist

Are work materials & equipment in a secure place that can be protected from damage or misuse?

Are there security requirements in place to protect confidentiality and security of company information and computer

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Office Checklist

NOTE FROM CONSULTING TEAM: This checklist is not to replace an assessment by your risk manager, legal counsel or workers' compensation provider regarding liability for employees at alternative work sites.

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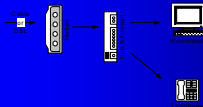
Technology Considerations



- ❑ Computers and communication
- ❑ Maximizing technology tools
- ❑ Wiring
- ❑ Security
- ❑ JDB Associates, LTD requirements

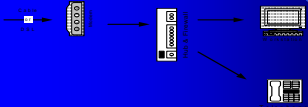
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IT Requirements



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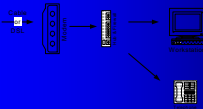
IT Requirements



- 4 Port Hub and Firewall
- VoIP Telephone

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IT Requirements



- Broadband Connectivity – Cable or DSL
- Cable or DSL modem
- PC Workstation

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Teleworking Tips

- Identify work activities
- Utilize measurement tools
- Have face-to-face meetings
- Combine necessary trips
- Overcome distractions
- Set realistic goals

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Teleworking Tips

- Organize work activities
- Establish communication
- Maximize your telecommuting schedule
- Balance work and family

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Teleworking Issues

- What will I do at home?
- How will it affect my personal life?
- How will my family react?


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Teleworking Issues

- How will I ignore distractions?
- How will it enhance my career?
- How much is it going to cost?

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Organizing and Managing Your Time

- Announce your status
- Plan your schedule
- Manage your workload
- Attend meetings

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Coping with Distractions



- ❑ Knowing your weaknesses
- ❑ Training your family
- ❑ Training your acquaintances
- ❑ Staying focused

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Managing Your Teleworking Career



- ❑ Communicating with your manager
- ❑ Staying visible
- ❑ Managing your telecommuting image

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Importance of Communication



- ❑ Staying in touch
- ❑ Remaining reachable
- ❑ Transparent teleworking

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