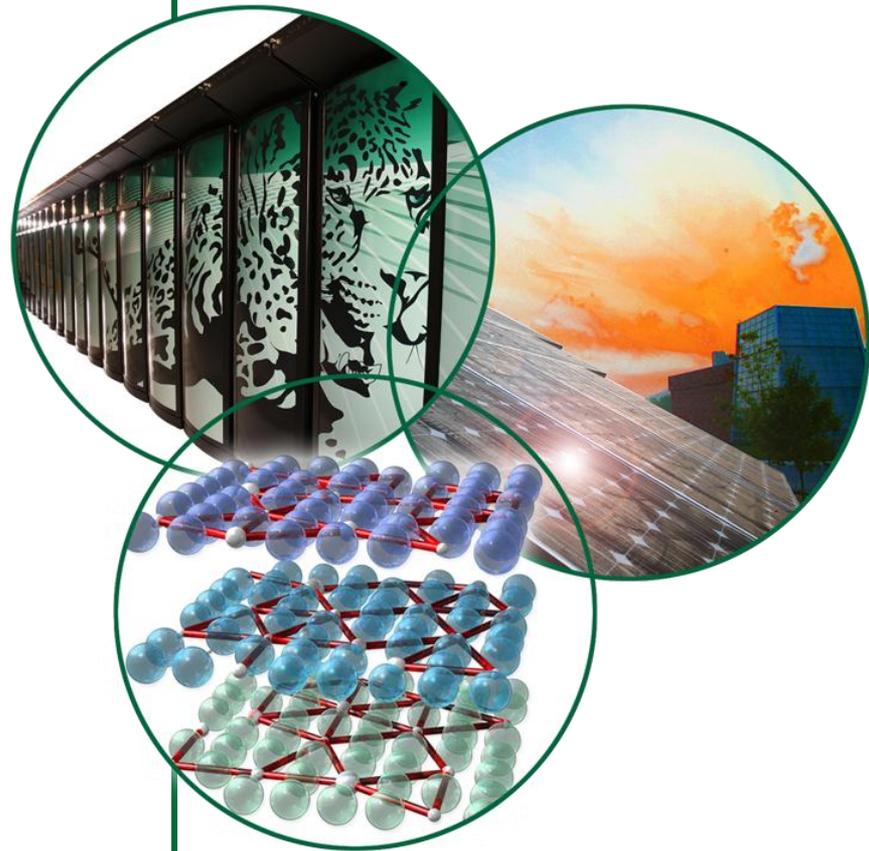


# A Guide for ORNL Telework Managers



# Telework at ORNL

Welcome to the world of telework. Telework is primarily an arrangement established to facilitate the accomplishment of work.

As a manager, much of the responsibility for the success of ORNL's telework program will fall to you. The manager determines which employees are permitted to telework, monitors their progress, provides support and encouragement, and determines if they are productive at telework.

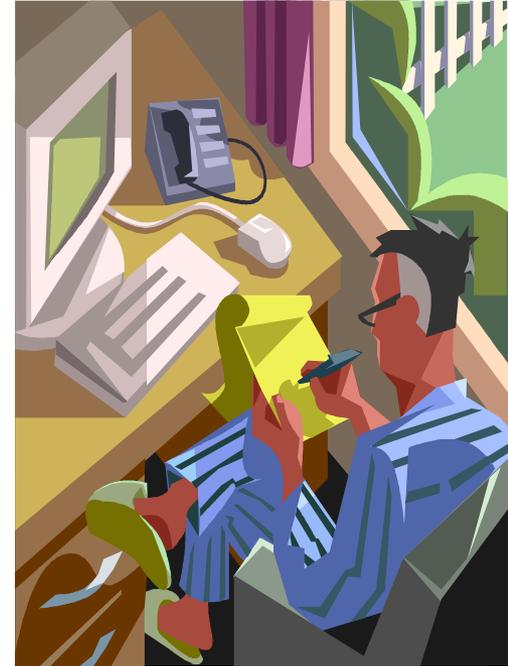
For some managers, becoming effective at managing teleworkers will mean a change in management style and technique. These changes will definitely enhance your own skill set and increase your value to the organization.

# Telework at ORNL

Telework as defined in the ORNL **Standards-Based Management System (SBMS)**: Temporary or long-term work arrangement that allows staff to work from home in the Oak Ridge/Knoxville metropolitan area during their regularly scheduled work hours.

Telework is addressed in the SBMS Alternate Work (AWL) Location Subject Area.

The Telework arrangement applies to all ORNL salaried employees but not to bargaining unit employees.



## Organizational Benefits

- Better space utilization
- Improved Employee productivity
- Superior corporate citizenship
- More mobile tech savvy work force
- Management focused on tasks accomplished and results obtained
- Creates an environment that is the most conducive to scientific research while attracting and retaining qualified and talented staff
- Reduced absenteeism, sick leave
- Telework drives better communication between managers and employees



# The Why of Telework

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

## Employee Benefits

- Improves work/life balance
- Reduces commute and office stress
- Reduces commute time & expense
- Improves personal safety
- Improves individual flexibility – so employees can work where and when they are most productive

## Community Benefits

- Improves neighborhood safety
- Reduces traffic congestion
- Improves air quality
- Reduces waste and conserves energy
- Builds closer bonds with family and community



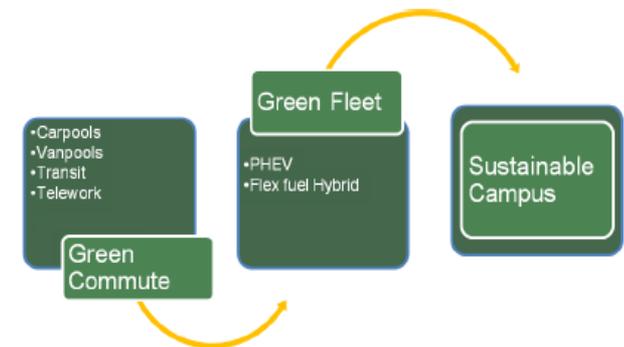
# The Why of Telework

## Why ORNL is offering telework:

Telework offers a number of potential benefits for an organization. Better employee retention, enhanced recruitment, compliance with commute trip reduction goals and reduced carbon emissions, to name a few.

- The *ORNL 2010 Commute Survey and Recommendations Report* recommended that ORNL implement an aggressive strategy to reduce single-occupant gasoline vehicles on campus to help address Scope 3 greenhouse gas reduction requirements in the White House Executive Order 135143. Telework is a key strategy to reduce in the number of vehicles, leading to better air quality, less congestion and safer traffic operations.

Sometimes the Smartest  
Commute is no commute  
at all!



<https://sbms.ornl.gov/sbms/sbmsearch/subjarea/flex/exhibit1.cfm>

Management System: [Human Resources](#)

Exhibit for Subject Area: [Alternate Work Locations](#)

Issue Date: Feb 03, 2012

[SBMS Home Page](#) | [Revision Record](#) | [Toggle Highlighting](#)

## Exhibit: Business Rules for an Alternate Work Location

The following business rules apply to all types of alternate work location assignments:

### Work Space

1. Staff must have designated workspace at the alternate work location that is free from distractions.
2. Staff furnish the designated alternate workspace at their own expense. Any tax implications related to the use of the employee's alternate work location as a work site is the employee's responsibility.
3. Staff are responsible for reviewing the ESH&Q [ergonomic site](#) and maintaining the workspace at the alternate work location in a safe and professional manner.

### Information/Equipment

1. Government-owned computers and telecommunication equipment, including software, can be placed in a staff member's alternate work location or other assigned regular work location, but ownership and control of hardware, software, and data is retained by ORNL. Any equipment provided will be subject to the same licensed software requirements, audits, and policies as required on the ORNL campus.

**Note:** The decision on whether to furnish equipment and office supplies will be made on a case-by-case basis based on such considerations as the nature of the work. ORNL is responsible for maintaining and repairing such equipment if it is made available to the employee.

2. Certain records maintained by ORNL are subject to the Privacy Act of 1974 (5 U.S.C. 552a) and must be maintained in accordance with the requirements. Refer to the [Implementing an Alternate Work Location](#) procedure and [Records](#) subject area for responsibilities.
3. Staff who possess or access sensitive information from an off-site work location must maintain appropriate administrative, technical, and physical safeguards to ensure the security and confidentiality of the records. Refer to the [Information Protection](#) subject area.

### Staff Availability

1. Staff must be available to come onto campus for periodic business meetings, training sessions, and other work activities as determined by their supervisor.
2. Staff must be available via e-mail and phone during scheduled business hours.

In addition to the above rules, the following rules apply to [telecommuting](#) assignments:

1. Staff member's alternate workspace location must be within the State of Tennessee and within a reasonable distance such that he or she can report on site at the supervisor's request.
2. ORNL will not reimburse any costs or mileage associated with travel between the employee's alternate workspace and any facility used by ORNL. This rule applies whether the staff member has chosen to attend a meeting or has been requested to attend a meeting.
3. Staff must have at least one year of company service working on the Oak Ridge Reservation with a performance rating of at least fully contributing (FC).

# Telework at ORNL

*UT-Battelle Business - Personal*

**Oak Ridge National Laboratory  
Alternate Work Location Agreement**

DATE: [redacted]  
Request Type: **TRANSITIONAL REMOTE HII** [redacted] ?

Initial  or Extension  

The following constitutes an agreement between UT-Battelle, LLC, Oak Ridge National Laboratory (ORNL) and employee who agrees to follow the terms and conditions of the Alternate Work Location Program. This agreement must be reviewed and approved annually from the date of implementation.

Employee Name: [redacted] Employee Number: [redacted]  
Position Title: [redacted] Division: [redacted] Manager: [redacted]

- Employee and supervisor have read and agree to abide by the Alternate Work Location Subject Area. ORNL management concurs with employee participation, and employee agrees to adhere to the applicable guidelines and policies.
- Explain nature and purpose of arrangement:  
[redacted]
- Employee agrees to work at an Alternative Work Location for a period not to exceed one year.  
Begin Date [redacted] End Date [redacted]
- Employee's work schedule will be:  
(At a minimum, this should cover the normal hours and days for each work site, and any arrangement for flexibility or schedule.) [redacted]
- New Work Location: [redacted] Personal Residence
- Will ORNL be providing Office Equipment and/or office supplies? NO  YES  If yes, attach list.
- Employee's supervisor has approved the employee's [work schedule](#) and arrangements have been made to record the employee's time and attendance.
- Employee understands that they must obtain supervisory approval of any absence or [time away from work](#) in accordance with [established procedure](#).
- Non-exempt employees must obtain approval for [overtime](#) in advance. By signing this form, employee agrees that failing to obtain proper approval for overtime work may result in cancellation of the Alternate Work Location arrangement or other appropriate action.
- ORNL will not be responsible for operating costs, home maintenance, or any other incidental cost (e.g., utilities) whatsoever associated with the use of the employee's residence.
- Employee will receive work assignments and review completed work as agreed to with their supervisor and documented in the [employee's performance plan](#).
- Employee's [job performance](#) will be evaluated based upon agreed-upon criteria and milestones as established with their supervisor.
- Employee may request to change their work location or return to an onsite work location at any time. Management must agree that an onsite work location can be arranged, particularly if this agreement is terminated early.
- Management has the right to terminate the Alternate Work Location agreement if the employee's performance declines or if the arrangement fails to meet organizational needs.

IF NOT APPROVED, ATTACH JUSTIFICATION.

SIGNATURE (Employee)	DATE	<input type="checkbox"/> APPROVED <input type="checkbox"/> DISAPPROVED
SIGNATURE (Manager)	DATE	<input type="checkbox"/> APPROVED <input type="checkbox"/> DISAPPROVED
SIGNATURE (Division Director)	DATE	<input type="checkbox"/> APPROVED <input type="checkbox"/> DISAPPROVED
SIGNATURE (HR Manager)	DATE	<input type="checkbox"/> APPROVED <input type="checkbox"/> DISAPPROVED

DISTRIBUTION: ORIGINAL TO: Division Human Resource Manager  
ORNL-591 (4/2012)

The SBMS establishes the procedures and participation criteria for telework, as well as the on-line form (ORNL-591) to be used for application for telework status.

This form requires a supervisor review with the cognizant Human Resource Manager (HRM) necessary for the approval or denial of requires to telework. Staff member's alternate workspace location must be within the State of Tennessee and within a reasonable distance such that he or she can report on site at the supervisor's request.

The following business rules apply to all types of alternate work location assignments:

### **Work Space**

1. Staff must have designated workspace at the alternate work location that is free from distractions.
2. Staff furnish the designated alternate workspace at their own expense. Any tax implications related to the use of the employee's alternate work location as a work site is the employee's responsibility.
3. Staff are responsible for reviewing the ESH&Q [ergonomic site](#) and maintaining the workspace at the alternate work location in a safe and professional manner.

### **Information/Equipment**

1. Government-owned computers and telecommunication equipment, including software, can be placed in a staff member's alternate work location or other assigned regular work location, but ownership and control of hardware, software, and data is retained by ORNL. Any equipment provided will be subject to the same licensed software requirements, audits, and policies as required on the ORNL campus. **Note:** The decision on whether to furnish equipment and office supplies will be made on a case-by-case basis based on such considerations as the nature of the work. ORNL is responsible for maintaining and repairing such equipment if it is made available to the employee.
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1. Staff must be available to come onto campus for periodic business meetings, training sessions, and other work activities as determined by their supervisor.
2. Staff must be available via e-mail and phone during scheduled business hours.

In addition to the above rules, the following rules apply to [telecommuting](#) assignments:

1. Staff member's alternate workspace location must be within the State of Tennessee and within a reasonable distance such that he or she can report on site at the supervisor's request.
2. ORNL will not reimburse any costs or mileage associated with travel between the employee's alternate workspace and any facility used by ORNL. This rule applies whether the staff member has chosen to attend a meeting or has been requested to attend a meeting.
3. Staff must have at least one year of company service working on the Oak Ridge Reservation with a performance rating of at least fully contributing (FC).

## Telework Eligibility

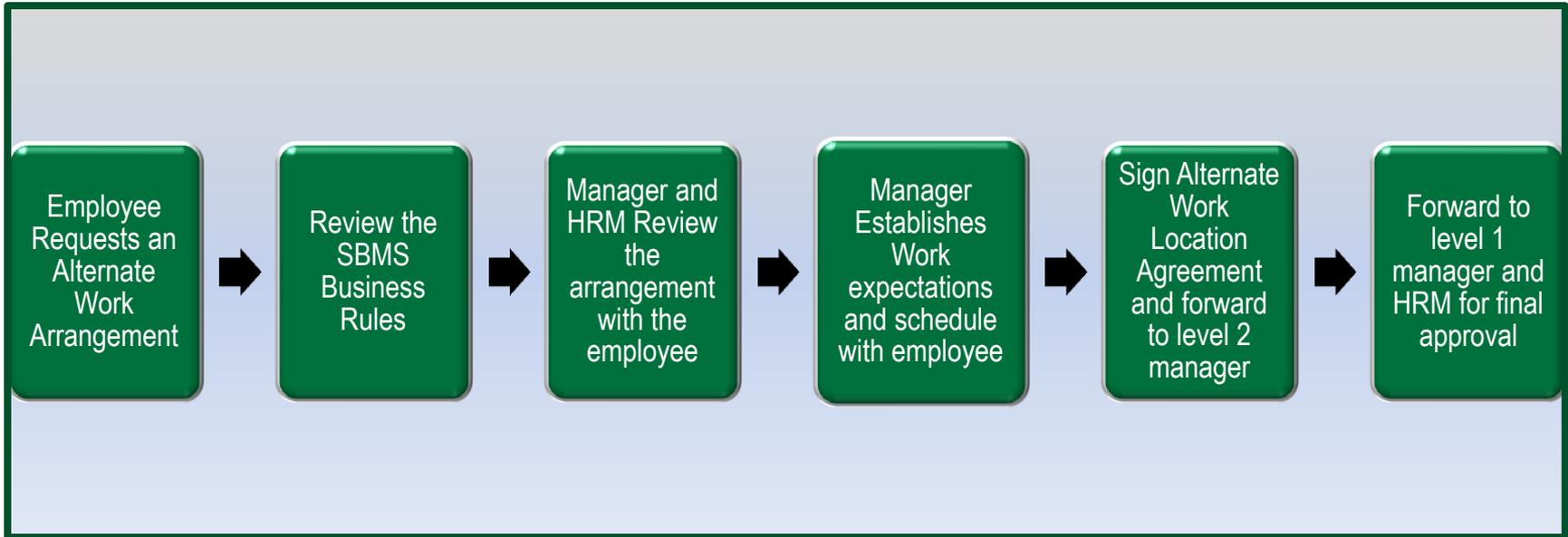
- Telework is not an employee right but a privilege. It is open to all salaried employees regardless of their line of work, provided they meet certain criteria.
- Employee Participation is voluntary.
- Every telework participant is required to have a written agreement. This agreement must be renewed annually.
- Threshold Qualifications - ORNL employees must have been with the lab for at least 12 months.
- The employee's most recent performance rating must indicate that the employee at least meets expectations (FC).

## Work Space

- Staff must have designated workspace at the alternate work location that is free from distractions.
- Staff furnish the designated alternate workspace at their own expense. Any tax implications related to the use of the employee's alternate work location as a work site is the employee's responsibility.
- Staff are responsible for reviewing the ESH&Q [ergonomic site](#) and maintaining the workspace at the alternate work location in a safe and professional manner.



## ORNL Processes Associated with Arranging for an Alternate Work Location



# ORNL Telework Policy

- As defined in SBMS, ORNL's telework policy covers employee eligibility, what types of positions are appropriate, spells out requirements for setting up a home office and sets rules for the use of government-furnished vs. user-furnished IT gear.
- Allows supervisors to decide which tasks and employees are suitable for telework
- Although the telework policy provides general guidelines but the telework agreement sets forth an individual teleworker's responsibilities.



# ORNL Telework Policy

- The telework agreement outlines:
  - how often employees intend to telework
  - where they will work
  - what they aim to accomplish
- Employee's performance is managed by objective; accomplished by the supervisor and employee establishing a set of milestones.
- Safety protocols remain the same and employees must follow ORNL protocols for reporting accidents and incidents in the home
- ORNL supervisors can end an employee's telework program at their discretion.
- All ORNL employees who are approved for telework should be encouraged to go through a telework skills training module available at (add URL and Sharepoint site). Although the telework policy provides general guidelines but the telework agreement sets forth an individual teleworker's responsibilities.

## Equipment

- The decision on whether to furnish equipment and office supplies will be made on a case-by-case basis based on such considerations as the nature of the work. ORNL is responsible for maintaining and repairing such equipment if it is made available to the employee
- Government-owned computers and telecommunication equipment, including software, can be placed in a staff member's alternate work location but a Property Removal Pass in ePROP, as applicable, must be filed out.
- Upon any loss, theft, damage, or malfunction of ORNL-provided equipment, the employee needs to notify their supervisor immediately.



# How to Be an Effective TeleManager

## Qualities of a good Telemanager

- Good supervisory skills
- Trusts employees
- Delegates work easily
- Confidence in the potential telecommuter
- Positive attitude toward telecommuting
- Strong communication skills
- Manages by results
- Organized
- Flexible, innovative, open to new

Managers and supervisors must be committed to using telework to the fullest extent possible if Federal telework programs are to succeed. Research in the work/life field bears out that supervisors, managers and senior executives who model the use of workplace flexibilities such as telework serve as **key drivers** in effecting positive cultural change in that organization.

Work is what you do,  
not where you go.

# 3 Legged Stool of Success

## Appropriate Job Tasks

### Manager

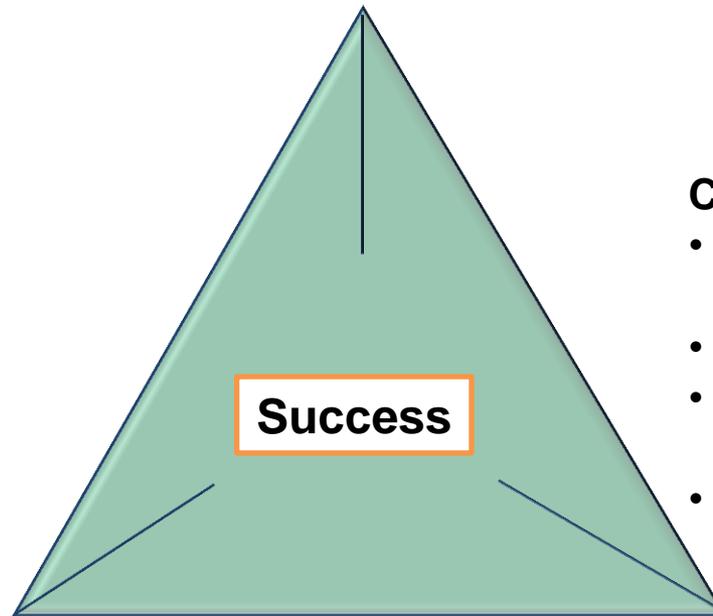
**Characteristics Include:**

- Good Planning Skills
- Manages Output - Not Time
- Provides Clear Objectives
- Monitors Off-Site Work
- Provides Timely & Constructive Feedback

### Employee

**Characteristics Include:**

- Perceived Self - Motivated and Responsible
- Independently Productive
- Understands Organizational Relationships
- Appropriate Work Environment



**Trust**



**Voluntary**

# What is the Right Fit ?

## What job tasks fit teleworking?

- Project-oriented work
- Computer programming
- Telephone calling
- Auditing reports
- Planning & scheduling
- Data processing & analysis
- Reviewing proposals and written reports
- Reading, word processing, and thinking

## What job tasks DO NOT fit teleworking?

- Tasks that are difficult to measure
- Tasks involving access to materials or information that cannot be moved
- Tasks requiring special in-house equipment
- Situations where face-to-face interaction is required

# What makes a good teleworker?



- Requires minimal supervision
- Has a high level of skill and knowledge
- Works well with family members
- Is productive at alternate workplaces
- Is self-motivated, well-organized, and highly productive
- Possesses strong time-management skills
- Solves problems independently before asking for help
- Communicates well with manager and co-workers

# What manager traits will cause telework to fail?

- Not trusting the teleworker
- Ignoring the teleworker
- Setting unrealistic deadlines
- Neglecting problems
- Supervising too closely
- Expecting everyone to be a good teleworker
- Not taking telework seriously



Peter Drucker, the famous management guru said that:

"Management is doing things right; leadership is doing the right things."

ORNL has decided that telework is right for the organization. As a manager, your job is to make sure it's done right.

- **Know the ORNL Telework Policy and Procedures**
- **Participate in Training:** The Office of Personnel Management (OPM) offers online interactive telework training for federal managers and employees. The course introduces managers to basic telework concepts and is relevant to ORNL managers. It covers manager responsibilities, the process the selecting the right employees for telework, and how to manage effectively in a telework environment. [www.telework.gov/tools\\_and\\_resources/training/index.aspx](http://www.telework.gov/tools_and_resources/training/index.aspx)
- **Select the Right Employees:** Don't approve telework just because an employee applies for it. Encourage employees to use the self-assessment form and discuss the results with them. Telework is not an employee right, even if the employee is considered "telework-eligible."
  - Be sure they understand the policy and their responsibilities. Select those with the right skills and right tasks for telework.
  - If you deny an application, base it on a good business reason for doing so. Explain to the employee why their application was denied and what would have to change for it to be approved.

# Tips for Success

- **Discuss Expectations:** Set clear expectations and identify specific deliverables with timelines. The telework agreement provides a framework for the discussion that needs to take place between the manager and the employee about expectations. Discuss how the employee will report their progress.
- **Treat all Employees Equitably:** In terms of expectations and work assignments, treat teleworkers and in-office employees the same. Failure to do so will create resentment in the ranks. When you make rules, try to make ones that apply equally to all employees. Managers should avoid distributing work based on "availability" as measured by physical presence, and avoid the pitfall of assuming someone who is present and looks busy is actually accomplishing more work than someone who is off-site.



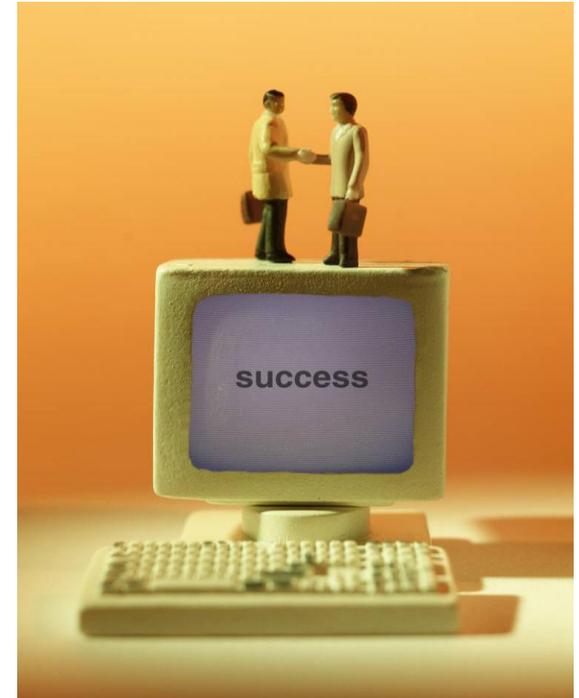
# Tips for Success

- **Safety:** Teleworkers must address issues of their own personal safety to be effective while teleworking from a home office or other alternative worksite. Managers should review a safety checklist with teleworkers to ensure compliance and should immediately investigate any reports of accidents or injuries on the job.
- **Security:** ORNL staff are responsible for the security of ORNL property, information, and information systems. Telework does not change this responsibility.



# TIPS for Success

- **Communication is Key:** Communicate freely, provide feedback, and encourage communication between team members regardless of where they are.
  - Use simple ORNL technology tools to communicate (phone, email, instant messaging) as well as other collaborative tools, like audio and video conferencing.
  - Post teleworker schedules and phone numbers to inform all employees how and where to reach each other.
  - Provide clear instructions, deadlines, progress reports and regular feedback
  - Schedule face-to-face meeting times



# TIPS for Success

- **Maintain the Team:** Coordinate staff meetings and teleworker schedules. Teleworkers may have to rework their schedule to come in for the meeting.
- Include teleworkers in events to preserve team cohesion and allow for social interaction.
  - Build a close team by keeping co-workers informed - make sure they feel a part of the team
  - If teleworkers begin to feel isolated, you may want to limit the number of days they telework.
  - Make sure everyone gets the same information



# Performance Evaluations

- Teleworkers and non-teleworkers should be evaluated using the same criteria; expectations should be the same for each.
- Managers may want to review the work of teleworkers more frequently, particularly during the first months, in order to identify and address problems. Topics for review might include:
  - Work Production: Are assignments being completed and deadlines met?
  - Work Quality: Is there any change?
  - Communication: Have there been any problems reaching the employee? Does the employee returned messages in a timely manner?
  - Technology: Has the employee had problems with equipment or remote access
  - Work Environment: Has the employee been able to create a work environment that is relatively free of distractions?
  - Work Habits: Has the employee settled into a productive work routine?
  - Team interaction: Is the employee able to communicate effectively with coworkers? Are employees having any feelings of isolation when working at home?

# Terminating Telework Agreements

- What if you have to terminate an agreement or decide not to renew telework privileges after the annual term of the agreement (remember the agreement must be renewed each year)?
  - If performance suffers after beginning to telework, review the situation with the employee and determine if the poor performance is related to telework or if there is some other cause. If you determine they are having problems with the requirements of telework, discuss this with them and decide if you should give them a chance to improve or if you should cancel the telework arrangement. Keep in mind that for some employees it takes time to adjust to working on their own.
  - The SBMS policy allows a supervisor to terminate the agreement for poor performance.
  - Terminating the agreement should not be arbitrary so clear expectations and reviews to discuss progress should precede termination of telework arrangements.

- How do I know if telecommuters are really working?
  - *Managers must focus on the quality, quantity, and timeliness of the work product, rather than on the process.*
- How can social interaction be maintained to keep telecommuters from feeling isolated from their colleagues?
  - *Part-time telecommuting, core days in the office, and frequent communication by phone, email, video conferencing; should be included in all meetings.*
- Is telecommuting a substitute for child or elder care?
  - *No. A telecommuter must focus on their job and not try to handle these demanding situations while working.*
- How do you manage the employees who aren't telecommuting?
  - *All employees should have a clear understanding of the selection criteria to minimize feelings of resentment over who is or isn't selected to participate.*
- What are the issues the telecommuters should be aware of?
  - *Coping with interruptions*
  - *Working long hours*
  - *Exercising self-control*
  - *Designating space*
  - *Gaining support*