HANDOUTS

from previous meeting

October 20, 2009

Draft

Conformity Statement through September30, 2009

***includes new (99) plus maintenance companies (431)

**this number includes companies less than 100

Employers with 100 or more employees

	through September 30, 2009 Level 3 Employers	through September 30, 2009 Level 4 Employers	through September 30, 2009 Levels 3 & 4 <100 Employers	NEW Confirmed to Date including <100 Employers for Levels 3 & 4 (through 9-30-09)	Amount Needed to Attain Goal for Levels 3 & 4	Goal to attain for new clients	Total Goals ***	TERM Counts FY08**
Alexandria	7	4	1	12	0	10	21	21
Arlington	22	12	4	38	0	12	93	118
DC	8	5	7	20	0	10	115	142
Fairfax	55	24	8	87	0	20	61	62
Frederick	4	0	0	4	0	4	5	2
Loudoun	7	2	0	9	0	9	17	10
Montgomery	27	12	7	46	0	22	172	100
Prince George's	3	0	0	3	1	4	28	17
PRTC	7	0	0	7	0	7	14	5
Tri-County	1	0	0	1	0	1	4	2
Total	**141**	**59**	**27**	**227**	**1**	**99**	**530**	**479**

Conformity Statement through September 30, 2009
Employers with less than 100 employees*

	Level 3 Employers	Level 3 # of employees	Level 4 Employers	Level 4 # of employees	Counted toward Conformity
Alexandria	3	123	0	0	1
Arlington	19	385	6	102	4
DC	20	636	3	62	7
Fairfax	14	813	0	0	8
Frederick	0	0	0	0	0
Loudoun	0	0	0	0	0
Montgomery	47	588	11	133	7
Prince George's	1	88	0	0	0
PRTC	0	0	0	0	0
Tri-County	0	0	0	0	0
Total	**104**	**2633**	**20**	**297**	**27**

* Companies that have less than 100 employees are added with other companies until the total is 100. This means that the number of employees is the determining factor, not the number of employers, but rather the number of employees.

Draft

Conformity Statement through June 30, 2009

Employers with 100 or more employees

	through June 30, 2009 Level 3 Employers	through June30, 2009 Level 4 Employers	through June 30, 2009 Levels 3 & 4 <100 Employers	Confirmed to Date including <100 Employers for Levels 3 & 4 (through 6-30-09)	Amount Needed to Attain Goal for Levels 3 & 4	Goal to attain for new clients	Total Goals ***	TERM Counts FY08**
Alexandria	6	2	3	11	0	10	21	21
Arlington	18	13	4	35	0	12	93	118
DC	8	5	7	20	0	10	115	142
Fairfax	41	18	3	62	0	20	61	62
Frederick	4	0	0	4	0	4	5	2
Loudoun	7	2	0	9	0	9	17	10
Montgomery	27	12	7	46	0	22	172	100
Prince George's	3	0	0	3	1	4	28	17
PRTC	7	0	0	7	0	7	14	5
Tri-County	1	0	0	1	0	1	4	2
Total	122	52	25	199	1	99	530	479

Conformity Statement through June 30, 2009
Employers with less than 100 employees*

|	Level 3 Employers	Level 3 # of employees	Level 4 Employers	Level 4 # of employees	Counted toward Conformity
Alexandria	18	366	0	0	3
Arlington	16	327	4	75	4
DC	20	636	3	62	7
Fairfax	9	313	0	0	3
Frederick	0	0	0	0	0
Loudoun	0	0	0	0	0
Montgomery	49	608	11	133	7
Prince George's	1	88	0	0	0
PRTC	0	0	0	0	0
Tri-County	0	0	0	0	0
Total	113	2338	18	270	25

* Companies that have less than 100 employees are added with other companies until the total is 100. This means that the number of employees is the determining factor, not the number of employers, but rather the number of employees.

M metro
opens doors
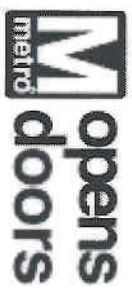
SmartBenefits

IRS Update
October 2009
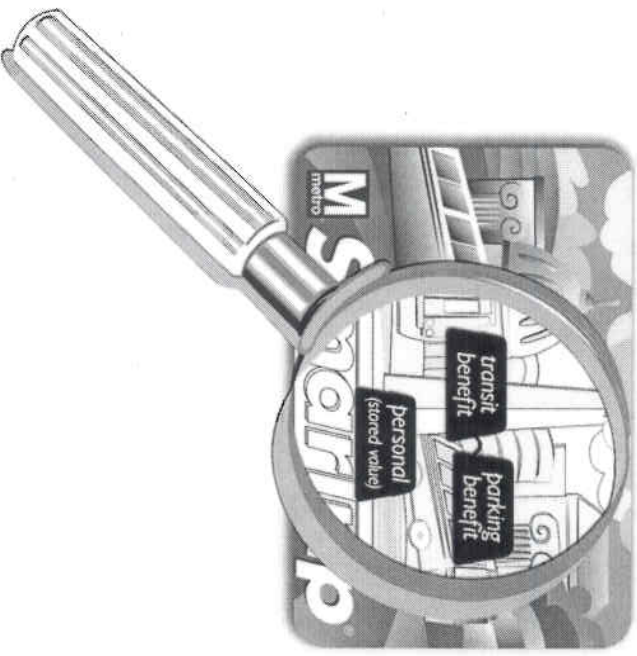
Dates and processes in this presentation are subject to change.

metro opens doors

Overview

- SmartBenefits®
- IRS Requirement
- SmartBenefits® Today (thru 12-31-2009)
- SmartBenefits® Changes
- Employer & Employee Process
- Communications

2

SmartBenefits® Program

Web based commuter benefits program that uses the SmarTrip® platform to assign employee's monthly transit and Metro parking benefits.
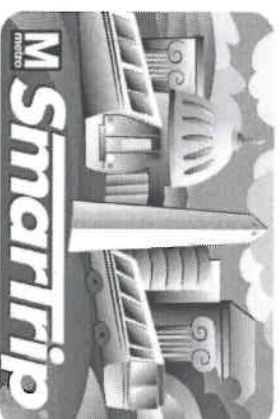
Internal Revenue Bulletin

Rev. Rul. 2006-57
November 20, 2006

- Provides guidance to employers on the use of smartcards to provide qualified transportation fringes under section 132(f) of the Code.

- January 1, 2010 – effective date

Key Message

- **The SmartBenefits® changes are being made to comply with IRS mandates to better control the allocation of transit and parking benefits.**

- **References:**
- **www.irs.gov/irb/2008-38_IRB/ar09.html**
- **www.irs.gov/irb/2006-47_IRB/ar05.html**

M metro
opens doors

SmartBenefits® Today
THRU 12-31-2009

- Employer assigns transit and/or parking benefit in SmartBenefits® account
- Employee loads at Metro station vendor
- Transit/parking benefits combined on card
- Unused benefits remain on SmarTrip® card
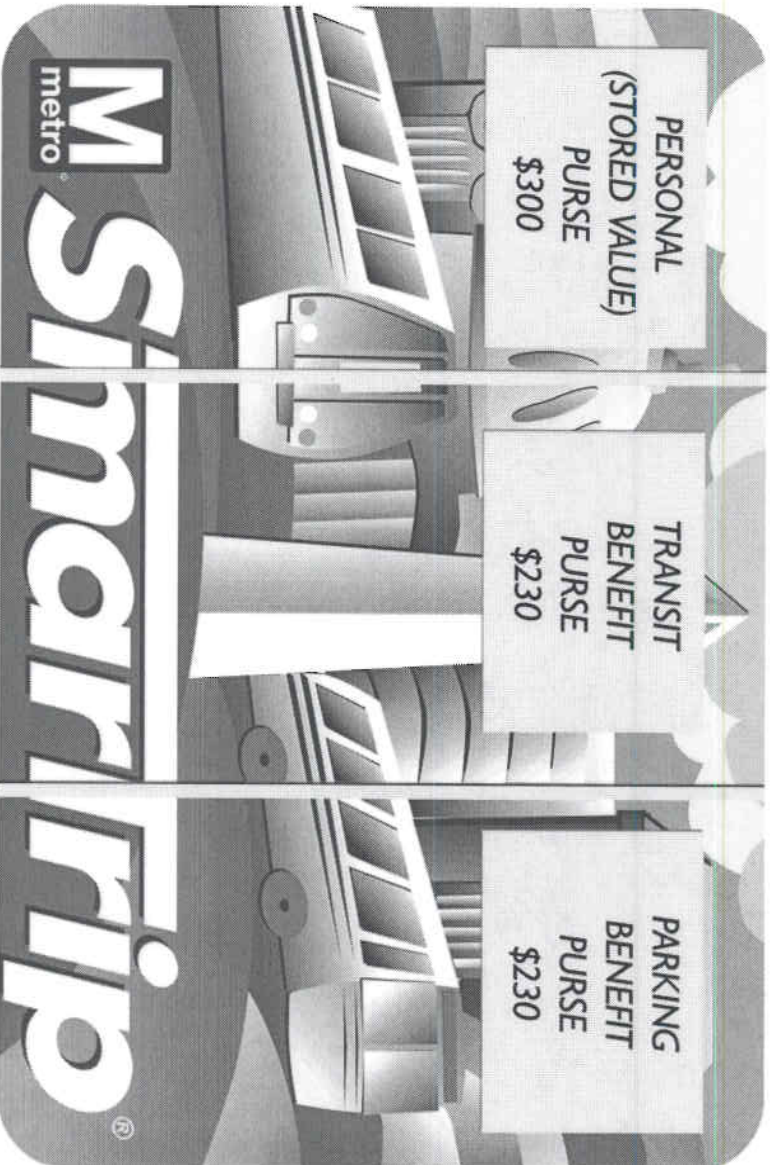- $300 maximum value on SmarTrip®

SmartBenefits® Changes
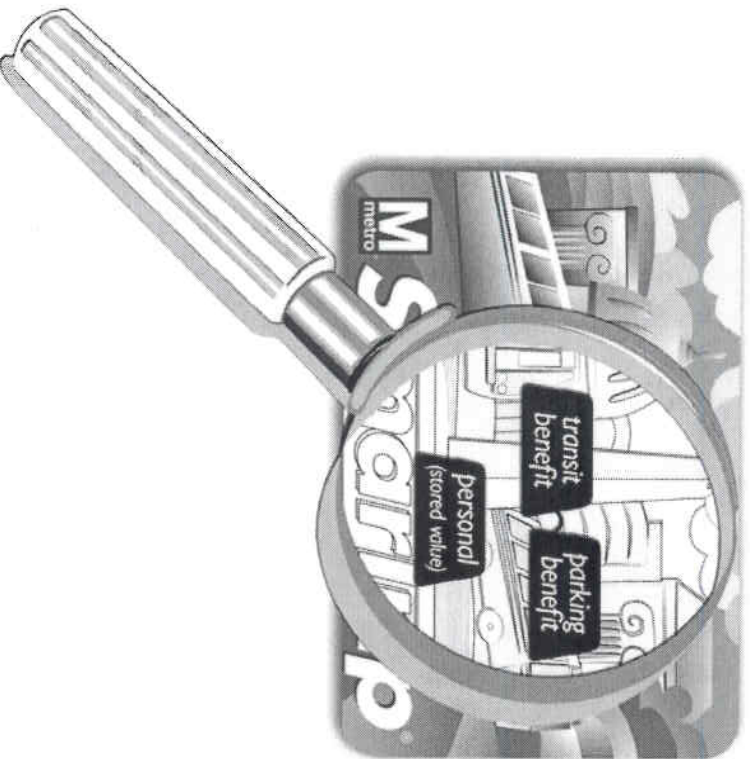
SmarTrip® Compartments

- **transit benefit**
- **parking benefit**
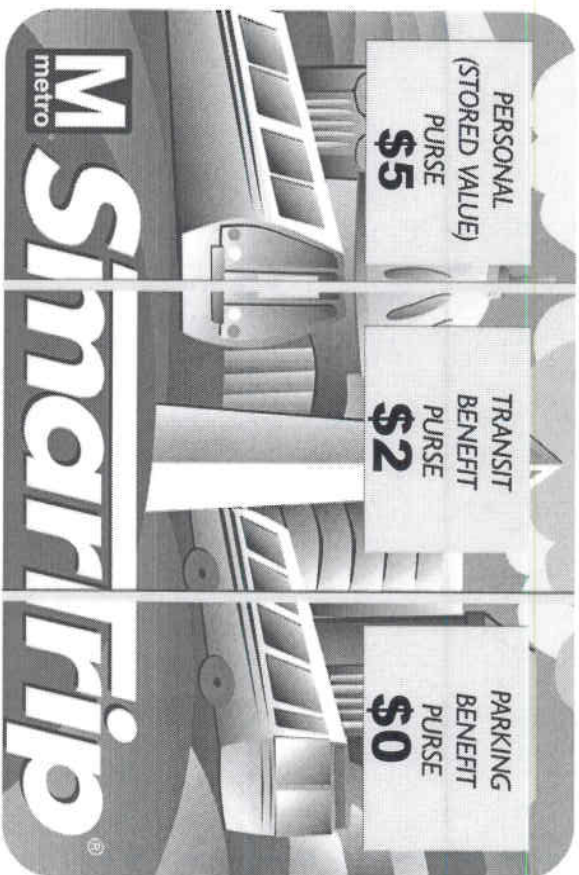- **personal stored value**

SmarTrip® Options

- IRS Limit
- IRS Limit

PERSONAL (STORED VALUE) PURSE $300	TRANSIT BENEFIT PURSE $230	PARKING BENEFIT PURSE $230

SmarTrip® Fare Example 1

A. Value on card $7
   $5 stored value
   $2 transit benefit
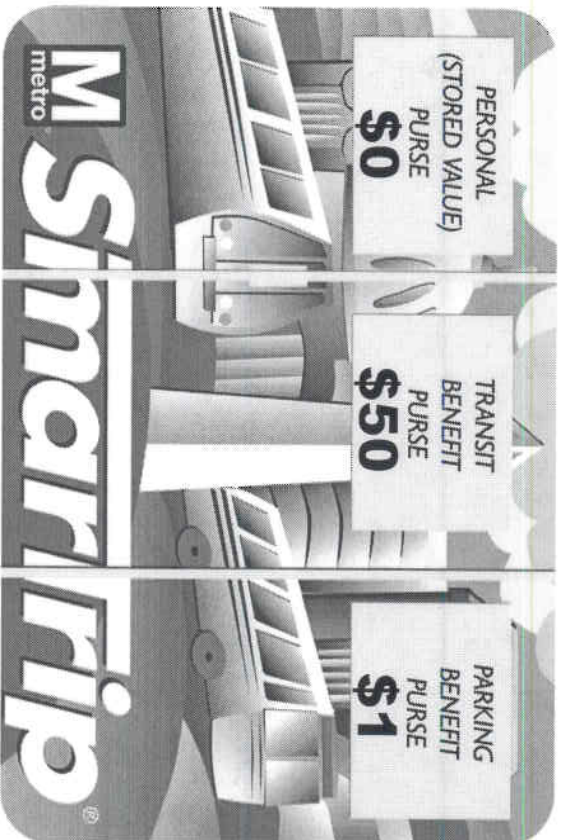
B. $4 Metrorail fare
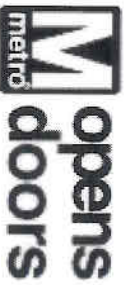
C. Payment: $2 from transit / $2 from stored value = $4
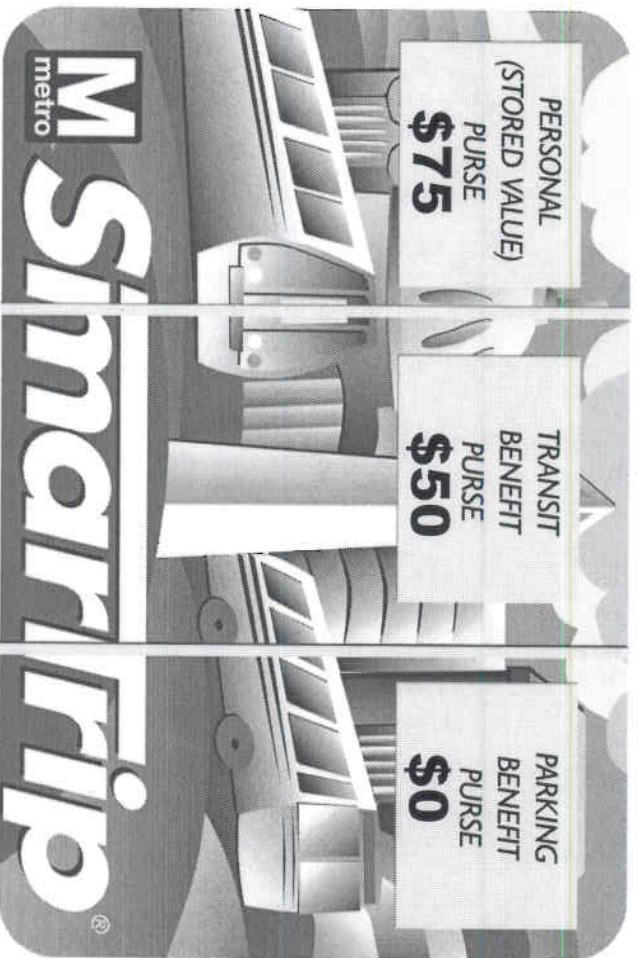D. Remaining value on card: $3 stored value

SmarTrip® Fare Example 2

PERSONAL
(STORED VALUE)
PURSE
$0

TRANSIT
BENEFIT
PURSE
$50

PARKING
BENEFIT
PURSE
$1

M metro
SmarTrip

A. Value on card $51
   $0 stored value
   $50 transit benefit
   $1 parking benefit

B. Commuting Costs $7
   $3 Metrorail fare
   $4 Metro parking

C. Payment: $3 from transit, customer must add $3 to card to cover full parking fee

D. Remaining value on card: $47 transit

SmarTrip® Fare Example 3

A. Value on Card $125
$75 stored value
$50 transit benefit

B. $1.25 DASH bus fare

C. Payment: $1.25 from transit

D. Remaining value on card: $48.75 transit, $75 stored

Key Changes for Employees
Values on SmarTrip®

- **Transit benefits for bus and rail ONLY**

- **Parking benefits for Metro parking ONLY**

- **Personal stored value for transit or parking**

- **Stored value remains on the card**

- **Unused benefits DO NOT remain on SmarTrip®**

- **Unused benefits are credited back to employer**

- **New monthly benefits will load when card is presented to any SmarTrip® target**

Employer Preparation

- **Separate transit from parking benefits in SmartBenefits® account by December 15**

  - **SBFT = transit benefit (bus, rail and van pools)**
  - **PARK = Metro parking benefit**
  - **OTRA = Official business travel (not IRS related) directed to stored value purse**

- **Communicate changes to employees**

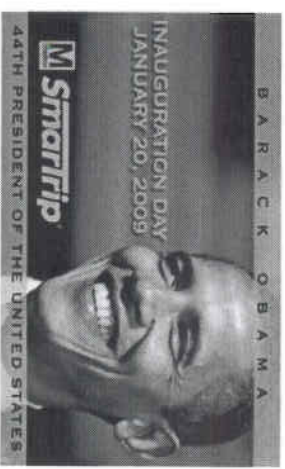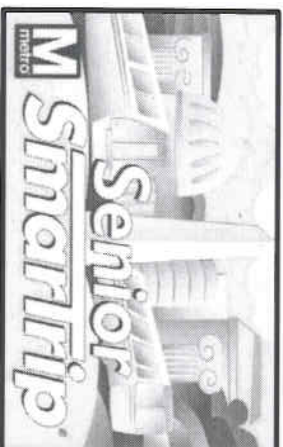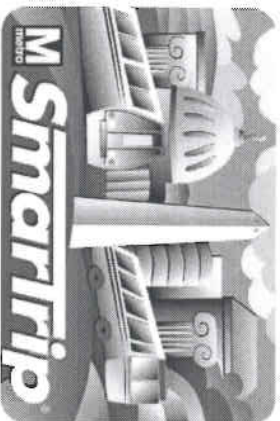- **Metro will direct benefits to correct compartments on SmarTrip®**

Employee Preparation

Q: Will employees need a new SmarTrip® card?

A: No. Present enrolled card to SmarTrip® target between Nov – Dec to prepare for:

- New card format: bus farebox or Passes/Farecards machine

- January benefit: any SmarTrip® target
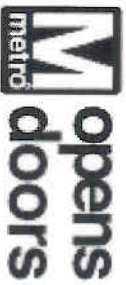
Van pools/Transit Services

Employees that allocate 100% of benefits to van pools, independent bus systems and other transit services will not be included in the January conversion process because the allocation does not run through the SmarTrip® card.

If a portion of the benefit is for Metrorail use, it can be claimed at any Passes/Farecards machine.

SmarTrip® Systems

M metro opens doors

- **Metrorail**
- **Metrobus**
- **ART**
- **CUE**
- **DASH**
- **DC Circulator**
- **Fairfax Connector**
- **Loudoun County Transit**
- **PRTC OmniRide**
- **Ride On**
- **TheBus**

M opens
metro doors
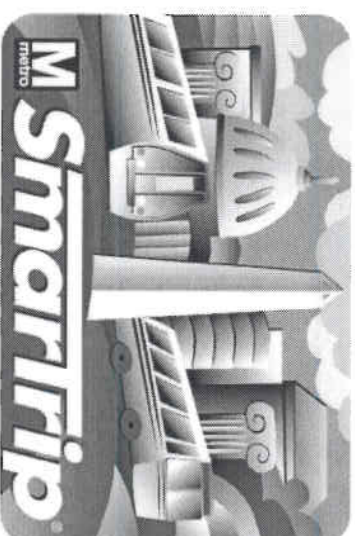
Communications

- **Meet with employers:**
  - **October 20 & 27**
  - **November 3 (feds only) & 17**
  - **December 2**
- **Provide messages for employers to distribute**
- **Inform regional transit partners**
- **Direct mail**
- **Web site**
- **News Release**

SmartBenefits®

Thank you

COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Employer Telework Case Study

Employer

Marriott International
10400 Fernwood Road
Bethesda, MD 20817

Contact

Nina Madoo
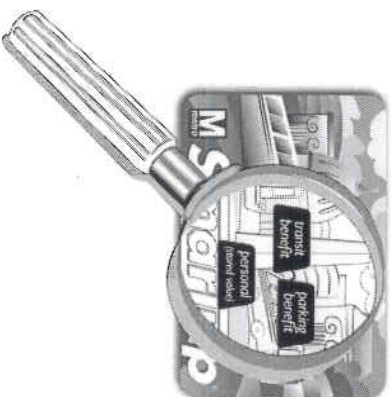**Senior Director of Workplace**
Strategies
301-380-7846
Nina.Madoo@marriott.com

About Marriott International, Inc.

Marriott International, Inc., is a leading lodging company. Its heritage can be traced to a root beer stand opened in Washington, D.C., in 1927 by J. Willard and Alice S. Marriott. Today, Marriott International has more than 3,200 lodging properties located in the United States and 66 other countries and territories.

People first—the foundation of Marriott's corporate culture and success for over 80 years! Marriott's belief is that our associates are our greatest assets. Marriott Culture is the experience we create for our customers, which is demonstrated by the behavior of our associates. It is people serving people.

"Green Marriott" is our company's commitment to sustainable environmental practices.

Telework History at Marriott

Marriott implemented their initial formal telework program in the late 1990's. In 2009, Marriott undertook the effort to increase the utilization of telework as a strategic talent management strategy across functional areas through additional tools and training.

Initial Implementation

Marriott currently has an Alternative Work Arrangements (AWA) Guideline that provides guidance to managers and associates on workplace flexibility in general as well as providing direction for associates in presenting a proposal and direction for managers in approving and formulating an arrangement. Marriott's Statement of Philosophy on Workplace Flexibility is as follows: *It is Marriott's intention to consider and where feasible, permit flexible work arrangements in situations*

where the needs of the business and the needs of the associate can both be met. The AWA Guideline sets to assist managers and associates in finding a way to work together in managing these arrangements.

In addition to the AWA which is the most common tool used to manage individual workplace flexibility, we have some tools and resources for managers and associates that can be used specifically for telework. These include the following:

- **Telework Policies** – Standard Operating Procedures for Managers to follow providing direction on the definition of telework, eligibility criteria, approval process, reimbursable expenses and other related policies

- **Telecommuting Agreement Form** An agreement letter between associate and manager that outlines details of the arrangement between the employee and manager

- **AWA On-Line Application Process** An on-line equitable process that allows headquartered based associates to apply for a flexible work arrangement. The process is automated via a customized system that involves the associate's immediate supervisor and HR generalist.

- **Additional Resources** - Available through Work/Life Resource and Referral service that include life articles, podcasts, booklets, CDs and web resources on telework, flexible work, managing remote workers, managing overwork, effective remote work strategies, etc.

Training is available to work teams on a fee for service basis and is typically arranged via the HR representative or department manager for the entire work team. We have seen the most success when teams are moving to remote work and training is incorporated as part of the change management process. The following training programs have been delivered:

Managing Remote Workers Participants in the workshop are shown the benefits and challenges of managing remote workers as well as strategies for staying connected with virtual teams. Focus is placed on effective ways to manage performance through a results-oriented approach. Ultimately, the goal is to help teams increase visibility and job satisfaction for increased engagement of the entire work team.

Success Strategies for Teleworkers Similar to the above class, this workshop also identifies the benefits and challenges of working remotely but from the end user perspective. Participants are given strategies to enhance their productivity and build relationships within the organization. They are taught the value of increasing their visibility and how to manage their careers in a remote capacity. Again, the ultimate goal is to increase engagement over the entire work team.

Training is one of the challenges we have and we do not have a comprehensive training curriculum for all remote or flexible workers. We have recently made more resources available to flexible workers including the following:

Telework (CD)

A 60 minute CD offering tips and strategies for staying connected to co-workers and customers including how to stay focused, setting boundaries and keeping your career on track.

Your Telework Day (Article)

This article provides tips and ideas for making your telework day more efficient and enjoyable including creating a better balance, the importance of organization, effective communication, and setting and meeting expectations.

Managing from a Distance (Article)

Managing associates from a distance can quickly becoming a normal part of a manager's role. You may have associates who work from home, travel as part of their jobs, or work at other locations. You may work from home yourself, from the road, or in an office distant from your associates. This article provides strategies to stay connected, manage from a distance and build your team.

10 Ways to Overcome Overload (Booklet)

Studies show that more and more people are feeling the effects of overload. Our personal and work lives have gotten busier and more hectic, and we all feel pressed for time. In this booklet, you'll find strategies and advice to help you overcome overload and feel more in control of your life.

The Telework Experience

Currently the telework program is part of the overall AWA offerings. Telework is a strategy that our associates (employees) are able to employ to help them manage the work and personal life responsibilities.

Telework differs from other flexible work options in that it tends to span across all four generations and both genders more broadly than other flexible work options. In a sense, telework is a gender neutral, generation neutral, family status neutral program. It works for all associates, no matter what stage of life, what stage of career. The true threshold for entering into a telework arrangement is about the nature of the individual and the position requirements.

Overview of Marriott's Headquarter's On-line Application Process

The purpose of the on-line application process is to provide an on-line, equitable, automated system for tracking and measurement. Associates are encouraged to initiate the process via our on-line system, Request Center. Managers are able to approve or decline the request on-line and HR has the ability to provide oversight throughout the process. Key considerations to ensure success of the process follow:

1. It is critical for the manager and associate to meet (preferably in person) to review the request and the implications to the individual, the manager, the work team and the business.

2. Any associate is eligible to apply for an AWA without prior approval; the associate

is not required to check with their manager or HR prior to initiating the process. Once the associate applies within the system, ample time is provided to meet and review the request and develop a formal proposal and response.

3. It is the intent of the on-line system to create an equitable process in which *all* associates have access, there is HR oversight and every request is given due consideration from management.

Telework Expansion

In early 2009, Marriott undertook an effort to expand their telework program through a pilot conducted with three company divisions. These efforts included reviewing the telework policy, defining the metrics and outcomes of the program, an extensive on-line survey, manager training and the use of the Work Suitability Assessment, (WSA).

The telework policy was reviewed and modified to ensure that employees fully understood the guidelines of the program, all liability concerns were addressed and managers were provided flexibility in effectively running their workgroups.

Metrics and outcomes for Marriott's telework program were formalized. The outcomes include:

1. **Talent Management**
   a. Employee Retention. Improved employee workplace satisfaction has a direct correlation in terms of employee retention.

   b. Employee Recruitment Costs and Reach. Telework reduces the "Time to Hire" metric and increases the "employment circumference" a company can recruit from.

2. **Human Capital**
   a. Employee Satisfaction/Commitment. Directly tied to employee retention, telework increases metrics such as employees' overall satisfaction with their company and commitment to stay.

   b. Employee Engagement. Employees participating in telework programs focus on results oriented tasks. Supported by the manager training the result is employees more engaged in their jobs and workgroup outcomes.

3. **Business Outcomes**
   a. Productivity Gains. In addition to increased employee retention and reduced recruiting costs employees in telework programs realize increased productivity due to working in a less disruptive environment and moving to a result oriented environment.

   b. Business Continuity. A formal telework program is a natural component of a thorough business continuity program. Allowing minimal disruption during severe weather conditions, electricity outages and other unplanned disruptions allows time critical tasks and customer service efforts to continue seamlessly.

   a. "Green" Marketing. Marriott will be able to track the number of automobile trips reduced as well as the resulting air pollution and particulate reductions.

An on-line survey was conducted with the employees of the three pilot groups. The

survey provided information about employee and managers' perceptions of telework, desire to participate in the program, commute methods used and attitudes towards Marriott. Feedback from the survey was utilized to determine expectations from the pilot and customize the managers' training.

The top-tier managers from the pilot groups were provided two training sessions that reviewed the goals of Marriott's telework program, the outcomes and metrics of the program and effective ways to manage and collaborate with teleworkers.

The Work Suitability Assessment is an on-line, interactive tool that allows employees and managers to investigate how well their job tasks and collaboration needs fit a telework program. The WSA is used in collaboration between an employee and their manager in the design of their telework program.

Challenges and Investment

Marriott's AWA program has been in place since the late 1990's. Tools and resources have been added over time and the AWA guideline is periodically revised to include updated vernacular, legislative changes such as updates to FSLA guidelines and revised programmatic changes due to changes demographics of working families. The initial investment involved resources to pull together the policies and programmatic effort but these were all done through internal manpower.

The implementation of the on-line application system was a significant investment of software development (approximately $27,500) and additional manpower resources to design, develop and test the software, links and system requirements. The next phase of expanding access to the on-line system, however, will be cost effective as it will be a minimum investment to expand the population and require minor adjustments to ready the system for specific business and functional area requirements.

The greatest challenges we have encountered have been with the on-line system and adjusting a process to different business and operating unit process requirements. It has been difficult to create a system that presents a consistent process when stakeholders currently have different approval processes in place. Prior to migrating to the on-line system, we have had to create consistency in the approval process, eligibility criteria and access to flexibility.

Program Outlook

Throughout its history, Marriott has distinguished itself as an employer that cares about and responds to associates' needs. Today, those needs are varied, reflecting the increasing diversity and changing demographics of the American workforce. Changes in the family and lifestyles make it increasingly difficult for associates to manage work and personal life responsibilities. Marriott is proud to have established workplace flexibility programs including Alternative Work Arrangements to meet these needs. Instituting workplace flexibility requires more than simply redefining work schedules. Creating a flexible work environment for associates at Marriott requires changing processes as well as changing behaviors and putting the

focus on results, versus the number of hours worked.

We have recently seen success in programs that help our hotel teams apply flexibility more broadly, across entire work teams. We have experimented with two such programs: BOLD Flexibility and Teamwork Innovations. Both seek to apply flexibility across entire work teams with a focus on improving results and productivity while improving workforce effectiveness. We will continue to look at broad based flexibility programs that apply flexible work solutions across entire work teams instead of individual accommodations. Our AWA program will always have a place in the workplace but we do not see continued growth in this particular program. We see more growth in programs that apply flexibility across entire departments and work teams, creating more access to all. AWA will be a program that helps individuals with their specific work/life challenge and will help managers and individuals work together to overcome those challenges.

Marriot's telework program will continue to be expanded throughout their headquarters in Bethesda, MD, after the pilot is completed in the summer of 2009.

Most Helpful Resources

The Workforce Effectiveness and Diversity Department provides consultative support to department managers and hotel leaders who are interested in implementing creative workplace flexibility solutions. In addition, flexibility is driven through work/life committees on our Regional Diversity Councils who represent work/life and diversity issues in the market.

Resources are available on our intranet site, Marriott Global Source, as well as a wealth of resources available through our resource and referral, *myARL or My Assistance and Resources for Life*. This service provides articles, tips, web resources, booklets and cds with strategies and tips for managing flexibility, work/load, remote work, telework strategies and much more to help our associates with flexibility and balance of work and life.

Success Tips

We regularly benchmark 100 best companies to see what other flexible work practices are available for us to test in our own workplace. In addition, we participate in webinars and conferences to learn of best practices and hear what other companies are doing in the area of flexibility and telework.

In the last couple of years, we have participated in a number of focus groups with our hourly, non-exempt associates to better understand what is important within that population from a flexibility standpoint and to learn how we can impact engagement.

COMMUTER CONNECTIONS®
A SMARTER WAY TO WORK

Employer Telework Case Study

Employer

U.S. Postal Service Office of
Inspector General
1735 North Lynn Street
Arlington, VA 22201-2020

Contact

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Background

The U.S. Postal Service Office of Inspector General (OIG), an independent agency within the Postal Service, employs more than 1,100 auditors, investigators, and professional support staff located in more than 90 offices nationwide. The OIG plays a key role in maintaining the integrity and accountability of America's postal service, its revenue and assets, and its employees. With $73 billion in revenue, the Postal Service is at the core of a $900 billion mailing industry that employs more than nine million people. The more than 700,000 employees of the Postal Service comprise the largest civilian federal workforce in the country.

In December 2004, the OIG launched an advanced telework policy, named **Smart Workplace** (SWP), as part of an overall effort to focus on the management of work assignments — not just the management of employees. This policy provides greater flexibility for OIG employees to perform their jobs where it makes the most sense, including outside of their assigned duty station.

The "Smart Work" Experience

The Smart Workplace program enables OIG staff to perform their assigned duties at optimal locations, including those outside of their regularly assigned duty station. Smart

Workplace allows employees to "work smarter" by working wherever it makes the most sense based on their assignments. Inherent with the program's flexibility is the option to telework.

Flexibility from both managers and employees is critical to the success of SWP. There are organizational or business needs that require individuals to be present at an assigned duty station and in those instances they are to provide appropriate notification and communication accordingly.

Challenges and Investment

In 2006, the OIG's Smart Workplace program was deemed successful and given the *Telework Award* by *Commuter Connections*. In mid-2008, an advisory council of managers and employees from across the OIG convened to re-examine the program. They discussed how to enhance the submission process and address concerns from managers and employees alike. One concern raised was the inconsistent application of some aspects of the policy. The council's general consensus was to formalize and standardize the process for submitting and approving Smart Work requests. The council believed this would result in consistency and enable monitoring. They also recommended utilizing new technologies to place the program online, to streamline and automate the process.

In September 2008 a smaller focus group of council members met and prompted the following SWP program enhancements:

- The policy supporting the program was updated to clarify and formalize the process of 'Smart Working,' and included a reporting function to better gauge consistent application across the agency and to measure program effectiveness.

- In conjunction with policy revisions, the council created an action plan calling for continuous communications from the highest levels of leadership to the managers and employees out in the field.

- Online tutorials walking through the process of filling out and reviewing plans to Smart Work were launched.

- Additional training is planned for later this year, and initial data from the reporting function will be analyzed to determine usage and indicators of improved performance trends.

- An online request form was created to track employee and manager accountability. It links to an automated calendar housed in the OIG's intranet portal — the Knowledge Centered Environment (KCE). The calendar (Consolidated Calendar) connects to various applications that track Leave, Training, and Travel. Now Smart Workplace information is displayed to both managers and employees at their team level allowing an at-a-glance indication of business activities to the individual and his or her management.

- Whenever an employee submits a plan to work away from their duty station, their manager receives an e-mail notification to review the plan. A form was designed to capture minimum information — such as the date and time of the requested SWP plan. Optional fields include alternate contact information such as a phone or e-mail address. The simplicity of the form and

the automated e-mail notifications were intended to help keep the administrative burden to a minimum for both the individual and manager. Requests that are denied are also tracked. Smart Work arrangements may be denied due to the need for face-to-face meetings or other business reasons that require the employee to report to their office.

After input from senior leadership, the legal department, council representatives, and the Inspector General, the policy was formally updated in April 2009. The revised policy and reporting functions enable managers and employees to approach SWP with more balance. The policy further clarifies manager and employee responsibilities when Smart Working, and even provides guidance for exceptional circumstances including limitations on employees whose work necessitates their presence at their assigned duty station. Open discussions between employees and managers about the best way to apply SWP, along with clear directions on assignments and expectations, are prerequisite to the submission of any SWP plans.

Program Outlook

The OIG's revised SWP policy and advancements in SWP tracking usage is timely and progressive in light of the two telework bills introduced before Congress this year* proposing updated standards for telework. Once the initial usage tracking data is analyzed, the OIG believes the reporting and flexibility of use across the organization will further validate the improvements, and show a return on

investment in terms of continuity of operations, continually increased productivity, and improved employee satisfaction.

The OIG faces the same human capital crisis as other government agencies, with the majority of employees coming from the "Baby Boomer" generation who are eligible for retirement in the next 5 to 10 years. Increased flexibility to work remotely is a privilege many of the Millennial generation consider highly valuable when seeking employment, and will assist OIG efforts to remain a competitive employer with other federal agencies and the private sector.

Most Helpful Resources

The OIG's Smart Workplace program owes much to the Inspector General, as the program's initial sponsor in 2004, and through his continued support for enhancements. The feedback from employees and managers, especially those from the September of 2008 council focus group meeting, was invaluable in identifying opportunities for program enhancements. The OIG's Information Technology team customized the online calendar and reporting to provide the increased accountability necessary to truly gauge the program's participation and outcomes. The revisions also relied on guidance from our legal office on the specific wording of the policy itself. Ultimately, support and promotion from the agency's executive management will be key to successful communication and program effectiveness.

Success Tips

To achieve similar telework results along the line of a Smart Workplace, the OIG recommends:

- Benchmarking with other agencies that perform similar functions.
- Solicit feedback from within all levels of the organization.
- Keep the rules simple as possible to provide guidance but allow for exceptions.
- Obtain communication support from leadership.
- Provide training and support on both the policy and associated tracking tools.

Above all else, trust in the professionalism of staff members is integral to successful telework programs!

The Telework Improvements Act (H.R. 1722) and The Telework Enhancement Act (S. 707) –111th Congress

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Employer Telework Case Study

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About Noblis

Noblis is a nonprofit science, technology and strategy organization that helps clients solve complex systems, process and infrastructure problems in ways that benefit the public.

Our unique impartial, independent stance—free of any ties to commercial or sponsor interests—assures clients that our counsel and implementation support is offered purely in their best interest.

Noblis is renowned for its work with numerous government agencies, as well as private and nonprofit clients. We bring the best of scientific thought and engineering know-how to find solutions that are practical, efficient and effective. You will find Noblis at work in many fields, including national and homeland security; transportation; healthcare; criminal justice; energy and the environment; oceans, atmosphere and space; and public safety.

The Telework Experience

In 1999, shortly after corporate decision makers conceived the program; they assembled a multidisciplinary design team of managers, information technologists, financial staff, legal counsel, human resources staff, and training experts and met to establish expectations.

At the forefront of those expectations were the program's stated goals (to attract and retain staff and be cost neutral), but the team also expected environmental benefits, such as reduced gasoline consumption and increased productivity from telecommuters. However, the team saw neither of these as key to the decision to implement telecommuting and therefore did not see a compelling reason to set up measurement systems to quantify benefits.

In 2000, Noblis established a telecommuting program that would allow eligible employees to work up to three days a week from home or from a designated telecommuting site. The program goals were to increase employees' schedule flexibility and work-life balance and to attract and retain information technology (IT) staff, many of whom were restive at the peak of the Internet boom. The telecommuting program was to be cost-neutral—no additional cost to either Noblis or the employees electing to telecommute.

Nine years later, the program has not only met and continues to meet its stated goals, but has also reaped the benefit of steadily reducing annual carbon dioxide (CO_2) output. In 2008, the reduction was nearly 4 percent and the program is expanding. Organizations that expand their telework programs are taking advantage of an opportunity to make an environmentally responsible decision.

However, no organization exists in a vacuum. Over the years, both the technology and corporate culture have changed, and the Noblis program has had to adapt to remain effective. Telecommuting has undeniable benefits for the environment, but any organization considering a program must recognize its flexible and dynamic nature. Noblis found that program success depends critically on fostering telecommuters' relationships with their immediate managers and on staying current with communication technologies.

Challenges and Program Implementation

The team identified three risks in implementing telecommuting: decreased staff collaboration because of decreased face-to-face time, less responsiveness to clients, and decreased employee morale either from telecommuters because they felt like outsiders or from those who wanted to participate in the plan but were not eligible. To mitigate these risks, Noblis relied on organizational and cultural approaches, as well as some IT that was novel for its time.

Survey data in 1999 showed that all aspects of successful companies depend on the close relationship between employees and their first-level manager. Exploiting that idea, Noblis implemented formalisms that were based on a voluntary agreement between the employee and the company. These mechanisms are still in effect. Each employee who volunteers for telecommuting goes through the three phases in Table 1. In the application phase, employees volunteer and are accepted if they meet certain criteria, such as job description and alternative work site. Certain jobs, such as physical security, simply cannot be performed from home and are not compatible with the program. The

alternative site does not need to be the home, but it does have to be safe and provide adequate space—a regional telecommuting site is appropriate, but a local Starbucks is not. To formalize acceptance, the employee signs a telecommuting agreement and goes over a checklist as part of the implementation phase. Finally, in the ongoing phase, the telecommuter and manager review the telecommuting decision as part of the normal annual performance review.

Believing that telecommuting decisions are best made directly by those affected, the program allows the employee and first-level manager to make specific decisions about who can telecommute. To ensure continued success, the telecommuter and the supervisor discuss performance at the end of the first and third months and then again as part of the employee's normal annual performance review. Each telecommuting phase is supported with assessment tools to guide the applicant and manager. The tools are designed to facilitate structured discussion between the employee and manager at established milestones.

The program emphasized the need for telecommuters to continue to maintain professional communication. Neither clients nor colleagues should be able to see a difference in the telecommuter's accessibility. As Table 2 illustrates, connectivity issues were vastly different a decade ago. When the program was conceived in 1999, pagers were often required for the employee to maintain immediate access, and rules had to be put in place to prevent family members from answering the telephone. Now with call forwarding and cell phones, employees have far less difficulty remaining accessible.

It is important for any organization to keep up with technologies that enable mobility and flexibility, such as laptops and collaboration tools. Employees are generally willing to meet the organization halfway in upgrading personal technology to meet communication and collaboration requirements. For example, Noblis provides a laptop or personal digital assistant to telecommuters, but the telecommuter is responsible for providing the required level of connectivity.

Moreover, telecommuting can often serve as a test-bed for new technologies. Several communication tools, such as instant messaging—first used in the telecommuting program—are now supported enterprise-wide.

Table 1. Tools to support the three phases of telecommuting participation.

Phase	Tool	Purpose
Application	Telecommuter self-assessment	Review and assess • nature of the job responsibilities, • employee's work characteristics, • alternative work site, and • equipment and telecommunications.
Implementation	Telecommuting agreement	Document expectations between corporation, manager, telecommuter, and work colleagues
Implementation	Telecommuting implementation final checklist	Review details of the individual telecommuting implementation.
Ongoing	Performance reviews	Review and assess telecommuter's performance • initially at months 1 and 3 and • as part of normal annual performance review.
Ongoing	Noblis Intranet	Enable posting of telecommuter schedules.

Table 2. Providing immediate access to clients and colleagues as designed in 1999 and as currently executed in 2009.

Requirement	Technologies	Approach When Telecommuting
Voice Communications Company Employee	1999 Digital PBX with voice mail • Text message pager or cell phone	• All calls from office phone sent to voice mail • Telecommuter notified via pager of voice mail or missed call • Telecommuter immediately returns call
Voice Communications	2009 • Cell phone	• All calls from office phone forwarded to cell phone or • Cell phone used as normal business phone
Data Communications	1999 • Laptop with email • Connectivity via dial-up access	• Document and message exchange via email • Text messaging via Instant Messaging
Data Communications	2009 • Laptop • Connectivity via broadband access • Blackberries and similar devices (Company or employee provided)	• Document and message exchange via e-mail • Text messaging via Instant Messaging • WebEx and other collaboration tools • Web access

A "Technology for Telecommuting: A Checklist" was developed to provide some criteria for deciding which technology can best support a telecommuting program. Security is an aspect often overlooked.

Technology Checklist

Voice: How can I remain in verbal contact with staff, colleagues, and customers? How do they get in contact with me without having to know if I'm at the workplace?

Applications: How does my application performance vary when I'm not in the office? How does occasional offline access affect application performance?

Security: What would happen if my laptop or home PC was stolen or otherwise compromised? How do I set up my physical facilities to minimize security risks?

Collaboration: How important are those water-cooler discussions and other face-to-face formal and informal interactions? If they are important, what is the remote equivalent?

The telecommuting program continues to meet its operational goals and has had surprising results in satisfying its green objectives as well. The program, which began with 3 percent of the eligible population, grew to 25 percent—exceeding Governor Kaine's goal of 20 percent for government agencies within the Commonwealth of Virginia.

The program has successfully increased employee schedule flexibility and improved employee work-life balance. Telecommuters report decreased stress and increased productivity and quality of life, citing benefits such as "avoiding even one day a week of bumper-to-bumper congestion" and "the quiet time that I need to creatively think and keep pace with a long list of action items."

The program also met its goals of retaining staff and being cost neutral. Attrition remains approximately 24 percent below the professional services industry average, and employees continue to share costs.

For the productivity benefit, there is only anecdotal evidence, but it does show the expected increase. Indeed, most participants believe that telecommuting is the only way

to keep up with the pace of business in 2009. The detailed operational aspects became less important as the commercial technology improved, and that trend should repeat in future years. Also, both the telecommuter and the first-line manager need to be agile, skillful communicators focused on achieving results, rather than simply on putting in time.

The immediate reduction in commuting costs to the telecommuter was expected, but over the program's life had a more significant impact on the environment than designers had envisioned. In 1999, green awareness was only beginning, and few organizations were thinking about quantifying greenhouse gases or gasoline consumption. However, the program has accumulated enough data to determine the cumulative environmental benefit retrospectively. Averaging telecommuting days (1.2) and distance from 2000 to 2009 and using average fleet miles per gallon, the typical Noblis telecommuter has driven 3,400 fewer miles per year and saved $460 in fuel costs. Given the program growth, cumulatively telecommuters have driven more than two million fewer miles over the last nine years (based on data from the Energy Information Administration data for the mid-Atlantic region over the program history).

Aside from gasoline consumption, employee commuting contributes significantly to the Noblis carbon footprint. Participating telecommuters decreased the total number of Noblis employee round trips by 8 percent—a much needed reduction in Northern Virginia, which is one of the regions challenged by pollution and traffic congestion.

Program Outlook

Although telecommuting reduced the corporate carbon footprint by nearly 4 percent in 2008, further reduction is clearly possible. Recognizing that telecommuting is not a viable option for every employee and that no one can telecommute every day, a reasonable maximum potential is 50 percent of eligible employees telecommuting 2 days per week. At this level of telecommuting, Noblis could realize a 12 percent reduction in its corporate carbon footprint. Clearly, from the current telecommuting level (25 percent telecommuting 1.2 days per week), significant green potential remains.

For Noblis, the telecommuting program began as an incubator for new corporate-wide technologies and operations. Now it is the backbone of business continuity; whether in response to unanticipated events or the typical winter snowstorms, the company relies on telecommuting laptops and ubiquitous broadband to keep responding to client needs. The program has grown steadily, yielding an unexpected benefit: Corporate carbon reduction from commuting was nearly 4 percent in 2008, and cumulatively, telecommuters drove more than 2 million fewer miles.

Success Tips

Support from management—from first line to corporate

• Agile first-line and upper managers able to function without employee collocation

• Participation by all management levels including corporate executives

Defined expectations

• Multi-disciplinary team to define objectives, policies, and agreements and to review periodically

• Policy manual and telecommuter's agreement define responsibilities

• Qualified participants screened through checklists

• Regular schedule with limited number of telecommuting days and regular office hours posted

Broad implementation

• Pilot program incorporates large cross-section of company

• Participants excluded only because of unique job requirements (for example, building security)

Appropriate infrastructure

• Safe and adequate home work space

• Adequate hardware equipment at home

• Network communications and applications available at home and at office

• Security and backup procedures in place regardless of location

• Technical support via help desk or on-line

COMMUTER CONNECTIONS®
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Employer Telework Case Study

Employer

Defense Information Systems Agency (DISA)

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Background

The Defense Information Systems Agency (DISA) is a combat support agency responsible for planning, engineering, acquiring, fielding, and supporting global net-centric solutions to serve the needs of the President, Vice President, the Secretary of Defense, and other DoD Components, under all conditions of peace and war.

DISA's teleworking program was established in 2001 and was successful in meeting OPM's requirement to have all the employees in eligible positions offered the opportunity to telework. However, the DISA policy allowed employees to telework a maximum of one day every two week pay period. As the result of the 2005 DISA Employee Satisfaction survey, a recommendation was made to expand DISA's telework program. On December 21, 2005, the DISA Director changed the policy to allow employees to telework a maximum of two days per week, totaling four days per pay period.

During the same time period, DISA was selected under the Base Realignment and Closure Committee recommendations for relocation of its Headquarters function in Northern Virginia to Fort Meade, Maryland. With 75% of the DISA workforce living in the Northern Virginia area, a solid strategy was needed for retention of this experienced, highly qualified workforce as well as one for recruitment of exceptionally qualified employees for the Fort Meade location. It was determined that the expansion of the telework program would serve as an excellent tool for both retention and recruitment. The successful implementation of the newly expanded telework program required extensive cultural change within all levels of management.

The Telework Experience

In January 2008, the DISA Director expanded the telework policy to three days per week, with supervisor approval.

DISA's telework participation has increased ten-fold since the initial expansion of the telework policy. Currently DISA has over 2500 employees with approved telework applications for regular and recurring telework (at least once a pay period) and "ad hoc" (typically once a month).

Annual employee satisfaction surveys reveal a steady increase in satisfaction regarding DISA's quality of work life programs that was directly related to the telework program. Employees are now provided an opportunity to improve their quality of work life, save money due to reduced transportation cost and help improve the environment. Employees and managers have also recognized an increase in productivity in most instances. Under its policy, DISA furnishes government equipment for teleworking, consisting of a laptop and docking station. DISA has also implemented measures to access productivity for employees while teleworking through optional work plans.

DISA's policy authorizes reimbursement for high speed internet cost for regular and recurring teleworking employees. Telework is also an essential COOP enabler. As an enabler of our COOP, emergencies and inclement weather no longer cause lost productivity with employees now able to be as productive at home when needed. DISA is setting the standard for an effectively managed and maintained telework program for the federal government. Telework has become an established way of doing business within DISA. DISA's telework program is not limited to the National Capitol Region and has been embraced by elements world wide. Approximately 45% of the agency's workforce teleworks to some extent.

Successful implementation of the program allows DISA to work toward and achieve the following objectives: Facilitate BRAC relocation to Fort Meade, Maryland; improve employee productivity; improve retention and recruitment; ensure continuity of operations during emergencies. The program will also help to promote DISA as an "Employer of Choice"; Enhance DISA's efforts in employing and accommodating people with disabilities, reduce traffic congestion, decrease energy consumption and pollution emissions, and reduce parking congestion, transportation cost and costs of transit subsidies.

With the implementation of the noted effort above, DISA is now recognized as one of the leading Federal agencies in telework. DISA has won four (4) awards from the Telework Exchange, a public-private partnership focused on demonstrating the tangible value of telework and serving the emerging educational and communication requirements of the Federal telework community. In 2007, DISA was the only DoD element cited in a testimony before a Senate Committee covering positive examples of telework within the federal government. DISA's Telework program was also selected for OPM's Chief Human Capital Officers (CHCO) Council's first Collection of Human Capital Practices for the Federal human resource community

Challenges and Investment

With the new policy in effect, several initiatives were implemented to leverage DISA's use of telework as both a recruitment and retention tool. These initiatives include:

A. A "SWAT" team, was charged with researching best practices at other organizations, determining what equipment was needed, developing training needed for management and the workforce, and bringing it all together within 90 days. A senior HR manager and a senior IT manager co-chaired the SWAT team, blending the two critically needed functions together during the entire process, reducing potential problems or issues. There was also a change in acquisition policy regarding computer life cycle replacement computer equipment; DISA now uses a 90% laptop to 10% PC ratio. DISA also pays for 50% of the broadband cost on a monthly basis into teleworking employees' homes.

B. Training was developed, specific to the culture of DISA, and provided to management at all levels as well as the workforce. In an effort to continually improve the program, training continues to be provided, including the creation of a computer based training (CBT) offering and instructor lead sessions "on demand." The training helps combat the fear factors managers and supervisors may experience prior to and during telework.

C. An innovative web-based application was developed to support the Telework program, which allows employees to register for the telework program and select the ad-hoc or regular and recurring days they would like to work remotely. Managers are notified of pending applications and can login into this application to approve, disapprove, or modify their subordinates'

registration requests. Additionally, managers can run reports which provide much needed data to assist in the Agency's management of the program.

D. DISA established its own telework centers at six (6) locations and continues to explore additional sites. DISA also continues to partner with OPM and GSA in exploring the possibility of establishing telework centers that will accommodate employees requiring access to the classified network.

Program Outlook

The telework SWAT team was established to forecast the way ahead for the telework program office. Although nothing has been set in stone they have made several recommendations for the program as we prepare for our move to Fort Meade Maryland. A listing of the recommended initiatives are:

A. Exploring the possibility of establishing telework centers that will accommodate employees requiring access to the classified network
B. Including managers in the telework program

Most Helpful Resources

To assist DISA in making the telework program successful, it was instrumental for all managers and supervisors to be on board with the program. The telework program office provided training for

managers and supervisor within each directorate on the policies and procedures of DISA's telework program. They also expressed to reluctant managers the benefits of teleworking, so they could adapt with the changes of their employees not physically located at their official duty station. Through the training, managers were able to express their concerns and successes of allowing their employees to telework. If it weren't for managers taking the initiative and adapting to the changes in this ever changing environment the program would not be a success.

Success Tips

The benefits of telework to both our employees and agency are listed below:

A. Increased employee productivity

B. Increases in retention, recruitment, and employee satisfaction are directly attributed to DISA's teleworking program

C. Improved quality of life, job satisfaction and transportation cost reduction

D. The ability to have a large portion of the workforce continue to be available and productive during emergency situations

And …. Telework is working ….just do it.

COG Commuter Connections

Employer Outreach Survey Results
07/01/08 – 6/30/09

October 20, 2009

This information is representative of the employers who were surveyed and may not be representative of all employers within the Washington Metropolitan Area.

Summary

- 4 employers participated
  - 1 District of Columbia, 64 surveys returned
  - 1 Fairfax County, 154 surveys returned
  - 1 Prince George's County, 42 surveys returned
  - 1 Tri- County Council for Southern Maryland, 17 surveys returned

Summary (continued)

- FY09
  - 2495 forms distributed
  - 277 surveys returned
  - **11% overall response rate**

Reasons for Absence

- 312 responses **(12%)**
- Most common response:
  - regular day off (69%)
- 2nd most common responses:
  - company business, leave (15%)
- Fewest responses:
  - telecommute (16%)
  - compressed work week (2%)

Arrival Times

- 270 responses **(18%)**
- Most common responses:
  - 7:46-8:00 (10%)
  - 9:01 or later (23%)
- Fewest responses:
  - 7:01-7:15, 8:31-8:45 (10%)
  - 6:31-6:45 (<1%)

Departure Times

- 216 responses **(8%)**
- Most common response:
  - 3:59 or earlier (25%)
  - 4:46-5:00 (17%)
- Fewest responses :
  - 6:01-6:15 (<1%)
  - 6:31-6:45 (0.00%)

Mode of Travel

- 1189 responses **(47%)**
- Most common responses:
  - drove alone (70%)
  - carpool (5%)
  - mass transit (23%)
  - walked (2%)
- Average Vehicle Occupancy **-1.7**

Distance from Worksite

- 276 responses **(11%)**
- Most common responses:
  - 10-19 miles (47%)
  - 0-9 miles (38%)
- Fewest responses:
  - 50+ miles (8%)
  - 40-49 miles (9%)

Incentives for Switching

- 1,775 times question answered
- Most common responses (multiple responses):
  - guaranteed ride home (32%)
  - transit benefit (30%)
- Fewest responses:
  - route and schedule info (26%)
  - bicycle storage and shower (12%)

Monthly Employee Parking Expenses

- 259 responses **(10%)**
- Most common responses:
  - $0 (98%) – (253)
  - $61-$80 (0.4%) – (3)
  - $21-$40 (0.4%) – (2)

Monthly Employer Transit Contributions

- 273 responses (**10%**)
- Most common responses:
  - $0 (30%)
  - $21-$40 (7%)

Zipcodes

- 174 different zipcodes represented
- Most common responses:
  - 20874 (Germantown,MD)
  - 20171 (Herndon, VA)
  - 22030 (Fairfax, VA)
  - 22033 (Fairfax, VA)