



Employer Telework Case Study

Employer

United States Department of
Agriculture

Animal Health and Plant
Inspection Service (APHIS)
Beltsville, Maryland

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Background

The Animal and Plant Health Inspection Service (APHIS) is a multifaceted agency with a broad mission area that includes protecting and promoting U.S. agricultural health, regulating genetically engineered organisms, administering the Animal

Welfare Act and carrying out wildlife damage management activities. These efforts support the overall mission of the USDA, which is to protect and promote food, agriculture, natural resources and related issues.

The Telework Experience

APHIS has had a telework program in place for 21 years with the telework program pilot beginning in 1990. In 2005 APHIS implemented an automated application system to keep better track of all telework participants/agreements and to reduce the need to print and file hard copy agreements. Employees are eligible to participate in telework and have flexible schedules. All employees who participate in telework, as well as managers who approve telework, are required to undergo telework training. As of June 2011, the policy of the APHIS Telework Program assumes that all employees and positions are eligible for telework, unless official duties require an employee to be physically present at a worksite on a daily basis and work cannot be performed remotely or from an alternative worksite. This is consistent with the current USDA Telework Policy.

Challenges and Investment

During the process of rolling out the new telework initiative, we encountered several challenges:

- Determining the final language of the telework policy: Once a new policy is drafted, it has to be vetted through the appropriate personnel for commentary. These comments are either incorporated into the draft, or an explanation has to be given to the originator of the comment as to why the suggestions were not included. The originator then has to concur with the reasoning. We received and processed many comments.
- Obtaining buy-in from management and employees and addressing misperceptions about the program.
- Identifying work positions that are ineligible for telework.

Program Outlook

The overall outlook for the MRP Telework Program is positive. IT continues to explore other solutions for making the telework connectivity process easier, and we are actively initiating and increasing participation in telework.

Most Helpful Resources

The program has received support from upper level management and an internal telework team that included all 10 APHIS programs, IT, Operations/Staffing, and representatives from each agency in the Marketing and Regulatory Programs, (MRP), mission area. It has also been helpful to have had the automated telework application system (Teleworks!) in place

since 2005. Distance Management (managing for results) resources for supervisors have also been a key component in securing managerial confidence in the program.

Success Tips

- Involve upper level management/executive team from the beginning to ensure support.
- Involve the various programs in the rewriting of the policy, thereby increasing buy-in from managers and employees.
- Keep Unions apprised of policy status and eligibility notification.

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About Calvert

Calvert, headquartered outside Washington, DC in Bethesda, MD, has been setting industry standards for investment management excellence since its founding in 1976. As a leader in sustainable and responsible investing, (SRI), Calvert offers a range of SRI strategies that meet sustainability goals for its clients and communities. Calvert serves individual and institutional investors as well as professional financial advisors nationwide. Today, more than

400,000 investors entrust over \$14.5 billion in assets to Calvert.

As a company, Calvert is actively committed to transparency and corporate responsibility as a core value—both inside and out. Calvert values a diverse workforce and seeks to represent the diversity of the Washington, D.C., metropolitan area among its associates. Calvert has a policy of actively hiring and promoting women and minorities, reflected in a workforce with 33 percent minority representation.

Calvert provides its employees with a flexible, family-friendly work environment to promote a healthy work-life balance, community involvement and volunteer activities, and strong corporate philanthropy policies that provide financial assistance to many local charities and community institutions. Full-time Calvert employees have the opportunity to take one paid day per month to perform community service.

Externally, Calvert partners with many non-governmental organizations (NGOs) in its advocacy work, whether to advance causes such as an end to the genocide in Sudan or engaging with companies that might not meet the funds' environmental, social, and governance criteria.

Background

In addition to Calvert's focus on investing in companies that are responsible towards their employees, the environment, the community, and more, as a component of their strategic sustainability goals, Calvert has actively adopted creative employee programs and benefits. In addition to telework, Calvert actively promotes and supports mass-transit and other alternative commuting options for its employees. Calvert purchases athletic shoes for employees who walk to the workplace, supports the purchase of bicycles for those who ride to the workplace and 100% reimbursement for employees who utilize mass transit.

In addition to being implemented as part of their corporate sustainability efforts, Calvert achieves other benefits through telework, including:

- Increased employee retention through enhanced employee satisfaction.
- Improved employee recruiting by attracting top-notch talent that highly values workplace flexibility.
- Productivity gains through reduced unplanned employee absenteeism and by allowing employees to work in a less disruptive work environment when job-tasks are being completed.
- A reduced environmental impact through the promotion of telework and other environmentally friendly programs.

The Telework Experience

Calvert has several alternative work arrangements, including compressed workweek, flextime, and telework. The

company has multiple types of teleworkers, including full-time, part-time and ad-hoc teleworking. Employees specifically interested in teleworking proceed with the following process:

- Discuss the preferred arrangement with their manager to determine if their job-tasks and workplace collaboration needs can be accommodated.
- Review information provided by Human Resources about the program structure, the program's objectives, key priorities and the skillsets and job-performance requirements for participating in the telework program.
- Propose the frequency and schedule of a telework arrangement, job-tasks that will be performed and how their performance will be reviewed.
- A trial period is determined with the manager for a telework performance review.

Employees who obtain approval to participate in the program and participate on a regular schedule sign an agreement that includes their contact information, program schedule, core-hour requirements and how they will communicate with their manager and workgroup while teleworking. The agreement is approved by the employee's manager and HR.

An alternative work arrangement guide is available for managers that provides information about the program's structure and how they can work within and support the program.

Supporting Technology

Employees may use personal computers and/or personal digital assistants as part of

teleworking. Some employees may use Calvert owned computers as part of their participation in teleworking.

A public key encryption system along with a virtual private network provides secure access to employee files and company data.

Challenges and Investment

Determining the types of job-tasks that can be supported through telework is a challenge. Program guidelines available through HR are instrumental in helping employees and managers make this assessment.

Success Tips

Develop guidelines for the types of job-tasks and workplace collaboration needs that support an employee teleworking.

Ensure that program information and support are available to both the employee and their manager.

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Employer Telework Case Study

Employer

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Background

Social & Scientific Systems, Inc., an employee-owned company, has supported public and private sector programs since 1978. We contribute significantly to improving public health around the world.

Whether we are supporting HIV/AIDS clinical trials around the world, providing program monitoring and evaluation services in Africa, collecting epidemiologic data in Europe, coordinating AIDS conferences in the Caribbean and Africa, or analyzing Medicare data in the United States, we consistently provide the highest quality support available. We are committed to conducting ourselves ethically, honoring our commitments, acting proactively and responsibly, and delivering excellent services—on time and at good value.

Social & Scientific Systems was founded by Herbert J. Miller, Denis Ables, and Mary Frances leMat in April 1978. This small, minority-owned business has grown from 4 employees to a 100 percent employee-owned business with approximately 500 employees. As we grew, we acquired four similar organizations. We are a viable enterprise with a diverse portfolio focused on public health. The company was a proud participant and graduate of the Small Business Administration's 8(a) program (1979–1988). We help clients reach their goals by providing research, information technology, and clinical support. Social & Scientific Systems currently has offices in

Silver Spring, Maryland; Rockville, Maryland; Durham, North Carolina; Kigali, Rwanda; and Kampala, Uganda.

Our mission is to improve public health worldwide by providing technical, research, and program management services to government and other clients. This support enables policymakers, medical professionals, communities, and citizens to improve public health knowledge and to mitigate the effects of devastating diseases, such as HIV/AIDS.

We achieve our mission through significant contributions to public health research, international health programs, and health information dissemination. And, we do this in the context of our four core values: exceptional employee-owners, outstanding client service, integrity and viability, and giving back to the community.

The Telework Experience

SSS considers telecommuting to be a viable alternative work arrangement in cases in which job characteristics are suited to such an arrangement. Telecommuting is a voluntary work alternative that may be appropriate for some employees and some jobs.

Participation in the telecommuting program is at the discretion of the supervisor, project manager, and their senior management. Participation in the telecommuting program is not an entitlement, and it does not change the terms and conditions of employment at SSS.

If approved for the program, the staff member may start by telecommuting 1 day a week. After a 3-month trial period, participation may be expanded at the discretion of the supervisor and project manager. Informal arrangements that

may be necessary to accommodate short-term personal and/or project needs are outside the scope of this policy and are dealt with on a case-by-case basis.

How to Apply

Before entering into any telecommuting agreement, the employee and supervisor evaluate the suitability of such an arrangement, paying particular attention to the following areas:

Employee Suitability – The employee and supervisor assess the work habits of the employee, compared with traits customarily recognized as appropriate for successful telecommuters.

Job Responsibilities – The employee and supervisor discuss the job responsibilities and determine if the job is appropriate for a telecommuting arrangement.

Equipment needs and scheduling issues -- The employee and supervisor discuss the equipment needs and scheduling issues related to the employee's job and determine if the job is appropriate for a telecommuting arrangement.

An employee interested in telecommuting must prepare and submit a *Telecommuting Application* form to his/her supervisor and project manager, along with the following documents: a 2-week time log of work tasks; equipment, software, and other resources required for the job; as well as the typical frequency and type of contact required with both coworkers and clients. This log is the basis for determining the equipment and software needed in the home office and the feasibility of telecommuting for this position.

The supervisor, after consulting with the project manager, writes a recommendation for approval or disapproval of the program. The recommendation should include information

regarding how the employee's participation in the program would affect project performance and client response requirements. If the application is disapproved, the recommendation must include a brief reason for disapproval. The supervisor then forwards the form to the appropriate senior management, who sends it to Human Resources for final action. The employee will receive a written response to the application from Human Resources. All applications and responses will be filed in the employee's personnel folder.

As part of the application, the employee must also submit a memo describing his/her home office, including the equipment, software, and phone line(s) available. This information will be submitted to the corporate Service Desk for review to ensure compatibility with SSS equipment. Any upgrades or changes to equipment must also be reviewed.

Employees whose performance or attendance is unsatisfactory or who are on a formal performance improvement plan are ineligible to participate in the telecommuting program. Groups may have additional eligibility restrictions for individual projects or positions.

Managing Time and Communications

The employee must arrange to have fixed hours for telecommuting. For at least 8 hours each day, 6 of which need to be during the regular workday, the employee must be available for phone calls and for the receipt and transmittal of e-mail. (S)he must also have a plan to handle incoming phone calls from clients. One possibility is to have office voice mail state the day(s) the person is working from home with a phone contact number for that period.

Facilities and Technical Considerations

The care and use of corporate equipment and software used at home is the responsibility of the employee; where personal equipment is used for company business, it must be compatible with company equipment. The employee is responsible for the cost of purchase and installation of required equipment and software, such as a separate phone line for a modem and/or fax or an Internet connection using a current approved Web browser.

Challenges and Investment

Our telework program had initial challenges during the implementation stage in 1999–2000, such as difficulty of staff sticking with the same telecommuting day each week or staff needing improved accessibility to files on the network. But these things soon resolved on their own as technology was enhanced and the company invested in VPN connections. As the policy was developed and put in place, guidelines for telecommuters were developed, including the day(s) an employee would telecommute. Overall, our telework program has provided very few challenges, and those challenges presented were easily addressed.

The company also made an investment in buying additional equipment for telecommuters to enhance off-site network access.

Program Outlook

With our commitment to work/life balance—we have received the Alliance for

Workplace Excellence Award for the 12th consecutive year (since the program's inception)—and our committed effort in recruiting and retaining top-notch employees, we will continue to offer these flexible commuting options.

Most Helpful Resources

To get the program in place, we initially conducted a pilot program. Several employees from different groups telecommuted on different days for about 7 months. At the completion of the pilot program, Human Resources gathered feedback from each employee on their experience and any difficulties they or their managers experienced during this time.

Success Tips

Obtain support from leadership.

Put in place a policy that provides guidance but allows for exceptions.

Solicit feedback from all levels within the organization.

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United States Department of Agriculture

Washington, DC (with employees assigned across the country and the world)

Contact

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Background

The USDA has a workforce of approximately 120,000 employees and provides the nation with leadership on food, agriculture, natural resources, rural development and related issues based on sound public policy, the best available science and efficient management. The Department is a vastly dynamic organization whose vision is to enhance agricultural trade, improve farm economies and quality

of life in rural America, protect the Nation's food supply, improve the Nation's nutrition, and protect and enhance the Nation's natural resource base and environment.

The Telework Experience

The USDA's telework program has been in place for more than 7 years. A newly updated Telework Program policy was quickly published in January 2011, to ensure consistency and synchronization with the requirements and guidance of the Telework Enhancement Act of 2010. Its new policy presumes that all positions are eligible to participate in telework. Unless there is thorough justification provided by management and verified by local Telework Coordinators, certain positions are not eligible for telework based on the following criteria:

- 1) Daily, face-to-face interaction with the public or customers is required and cannot be performed from an alternate worksite;
- 2) The use of specialized equipment is required and not available from an alternative worksite;
- 3) Access to classified material or information on a daily basis is required and cannot be accessed from an alternate worksite.

A new, standardized USDA Telework Agreement Form was developed in February 2011 and is required for all teleworkers and telework arrangements, both ad/hoc or situational and regular or recurring. The agreement form indicates whether teleworkers are coded as emergency essential or mission critical (for COOP purposes) and allows for maximum flexibility in implementing telework, especially during unplanned events or emergencies when Unscheduled Telework may be a suitable option as authorized by the Office of Personnel Management (OPM). 9% of USDA employees were teleworking on a regular basis and 14% on an infrequent basis as of 2010.

In Spring 2011, the USDA rolled out its new interactive telework training--delivered both in-person and via LiveMeeting--so that employees around the globe could meet the training requirements for telework and join in the sessions, straight from their desktops. Courses are designed to emphasize the importance of managing by expectation and performance outcome rather by virtue of location or proximity to their supervisor.

After determining eligibility of USDA positions and notifying eligible employees of their status in June 2011, the USDA is now focused on meeting its aggressive FY2011 participation goals: 50% of all eligible positions participating in ad/hoc telework arrangements and 30% of all eligible positions participating in regular/recurring telework arrangements. When this goal is met, it would mean a 70% increase from the 2010 numbers reported.

Challenges and Investment

Several challenges arose for the USDA during the implementation of new changes

to its Telework policy, the primary being how to consistently apply the program across the Department, with as little variance as possible, while taking into account the several labor unions that were involved in collective bargaining. Additional challenges included:

- Defining the applicability of telework for its large demographic of remote, mobile and field workers that was traditionally considered ineligible for telework.
- Identifying the technology options for remote access and collaboration that are currently available--in different pockets with varying security policies, for investment across the Department, and for enterprise-wide use.
- Transitioning the workplace culture that traditionally viewed work as being done "in an office where you can be seen" to a culture that embraces workplace flexibility and measures success based on performance rather than location.
- Ensuring that Telework Coordinators understand their responsibilities, the law, the new policy and how to best report on their programs.
- Educating employees that telework is a benefit, not an entitlement, and that there are certain responsibilities and levels of accountability which must be met in order to demonstrate success and expand the participation of those who already have been teleworking.

Program Outlook

Areas and Agencies will be required to report their participation levels on a bi-monthly basis to the USDA's Telework

Managing Official (TMO). These reports ensure consistent application of the new telework program policy and better accountability in how the program is administered, which will also be delivered to the Secretary of Agriculture in ongoing Cultural Transformation reports.

Fiscal Year 2012 Telework Program goals and initiatives include:

- An automated Telework Management System (TMS) which will consistently track and report telework agreements, types of arrangements and other important statistics relative to telework eligibility and participation.
- Standardized telework eligibility statements on all position descriptions in order to facilitate recruitment initiatives in alignment with diversity recruitment, hiring of people with disabilities and the veterans' employment initiatives.
- Forming an employee-based Work/Life and Wellness Council with the Labor Management Forum to take a grass-roots approach to identifying challenges and capitalizing on successes for addressing workplace issues, including the ground truth on how telework is being implemented and expanded across the Department.
- Developing a telework web portal from the USDA's learning platform, AgLearn. This website will serve as a central resource for telework training, news and policy updates and for structuring a community of practice for all employees, supervisors and managers interested in learning more about the USDA Telework Program.

- Piloting full-time telework arrangements that look at how implementing telework on a permanent, large-scale basis can offer the USDA significant cost savings with regards to a decrease in locality pay, transit subsidies, utility costs and real estate.

Most Helpful Resources

Secretary Vilsack's Cultural Transformation initiatives have given the Telework Program momentum across the Department and have increased visibility on the effect of telework on the workforce and in relation to employee morale.

An internal partnership between the Office of Human Resources Management and the Office of the Chief Information Officer has helped to quickly overcome technological barriers to teleworking and strengthened the ability to enable mobile work.

The USDA Work/Life and Wellness Team, including Telework Coordinators, meet regularly and have direct access to the Department's Work/Life and Wellness Program Manager, who helps interpret policy and provides program guidance and oversight on a regular basis.

Success Tips

Best practices include:

- Engaging local Telework Coordinators on all policy changes and initiatives in order to form a collaborative working environment that is open to new ideas and suggestions and that will identify best practices.
- Creating a strategic marketing plan that includes written articles in the

new monthly Cultural Transformation newsletter, *My USDA*; employee access to an all-USDA telework email inbox; in-person Telework Program brown-bag forums, luncheons and meetings.

- Socializing the new telework program initiatives with the USDA Labor Management Forum for informational purposes and pre-decisional involvement.
- Developing interactive training that focuses on management by objectives and performance, specifically related to telework.
- Linking return-on-investment of the telework program to reductions in transit subsidy funding, recruitment and retention initiatives, strategies for the hiring of people with disabilities and other strategic human capital goals.
- Promoting and educating the workforce on the fundamentals of the new telework program so that they can effectively request to participate in the program and understand the process of negotiating agreements with their management teams.

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