



## **Flexwork Santa Barbara Phase I Program Final Report**



**Prepared by  
Telecommuting Advantage Group and  
SBCAG Traffic Solutions  
July 11, 2006**



# Table of Contents

<b>FlexWork Santa Barbara Phase I Report .....</b>	<b>Pages 2 - 9</b>
FlexWork Phase I Overview .....	Pages 2
Strategic Elements of the Phase I Program .....	Pages 2 - 3
Participating Organizations and Project Timeline.....	Page 3 - 4
New Participating Organizations .....	Page 5
Phase I Consulting Components .....	Pages 5 – 6
Project Outcomes and Performance Measures.....	Pages 6 – 9
Final Notes .....	Page 9
<b>Appendix A: Case Studies .....</b>	<b>Pages 10 - 47</b>
UC Santa Barbara Case Study .....	Pages 10 - 17
City of Santa Barbara Case Study .....	Pages 18 - 24
Cottage Health System Case Study .....	Pages 25 - 29
SB Sheriff’s Department Case Study .....	Pages 30 - 33
SBCAG Case Study .....	Pages 34 - 37
Veeco Systems Case Study .....	Pages 38 - 39
Superconductor Technologies Case Study .....	Pages 40 - 41
Goleta Water Case Study .....	Pages 42 - 43
<b>Appendix B: Sample Documents and Tools .....</b>	<b>Pages 44 - 57</b>
Sample FlexWork Policy .....	Pages 45 - 46
Sample FlexWork Agreement .....	Pages 47 - 48
Sample On-Line Survey Questions .....	Page 49
Sample Website Components .....	Pages 50 - 57
Website Screenshots .....	Pages 50 - 51
Checklist .....	Page 52
Work Suitability Assessment .....	Pages 53 - 55
Employee Suitability Assessment.....	Pages 56 - 57



# Flexwork Santa Barbara Phase I Program Overview

## Overview of FlexWork Santa Barbara Phase I Program

SBCAG Traffic Solutions has included telecommuting and flexible work schedules (flexwork) as part of its overall Transportation Demand Management (TDM) program since its formation in 1993. However, prior to 2004 flexwork was only passively promoted. Traffic Solutions had produced a Telecommuting Manual for Managers and had included flexwork information on its website, but no official programs had been pursued. In 2004, SBCAG launched the 101 In Motion planning effort to address traffic congestion along Highway 101. As part of this planning effort, a long list of “early action” congestion relief projects, including flexwork were identified that would provide short term relief prior to implementing the large capital improvements identified in the plan. Traffic Solutions recognized the potential to increase flexwork along the Highway 101 corridors but did not possess the specialized skills to implement flexwork programs in house. In May, 2004 after issuing a Request for Proposals for telecommuting consulting services, SBCAG Traffic Solutions entered into a 2 year contract with The Telecommuting Advantage Group (TAG) to implement the first phase the Flexwork Santa Barbara Program (FlexWork SB Phase I program).

The goal of the FlexWork SB Phase I program was to recruit 7 to 10 employers to implement pilot flexwork programs to help develop solid case studies that make the business case for flexwork, thereby stimulating more flexwork throughout the county and reducing traffic congestion and improving air quality along the Highway 101 corridors. The pilot program employers were provided with free consulting services from TAG to develop, implement and evaluate flexwork programs for their employees.

## Strategic Elements of the FlexWork SB Phase I Program

The strategy included the following elements:

- 1) Recruit a cross-section of organizations within Santa Barbara County into the FlexWork Phase I program, including at least one in each of the following categories:
  - a. Large government organization
  - b. Small government organization
  - c. Large private sector company
  - d. Small private sector company
  - e. High tech company
  - f. Healthcare organization

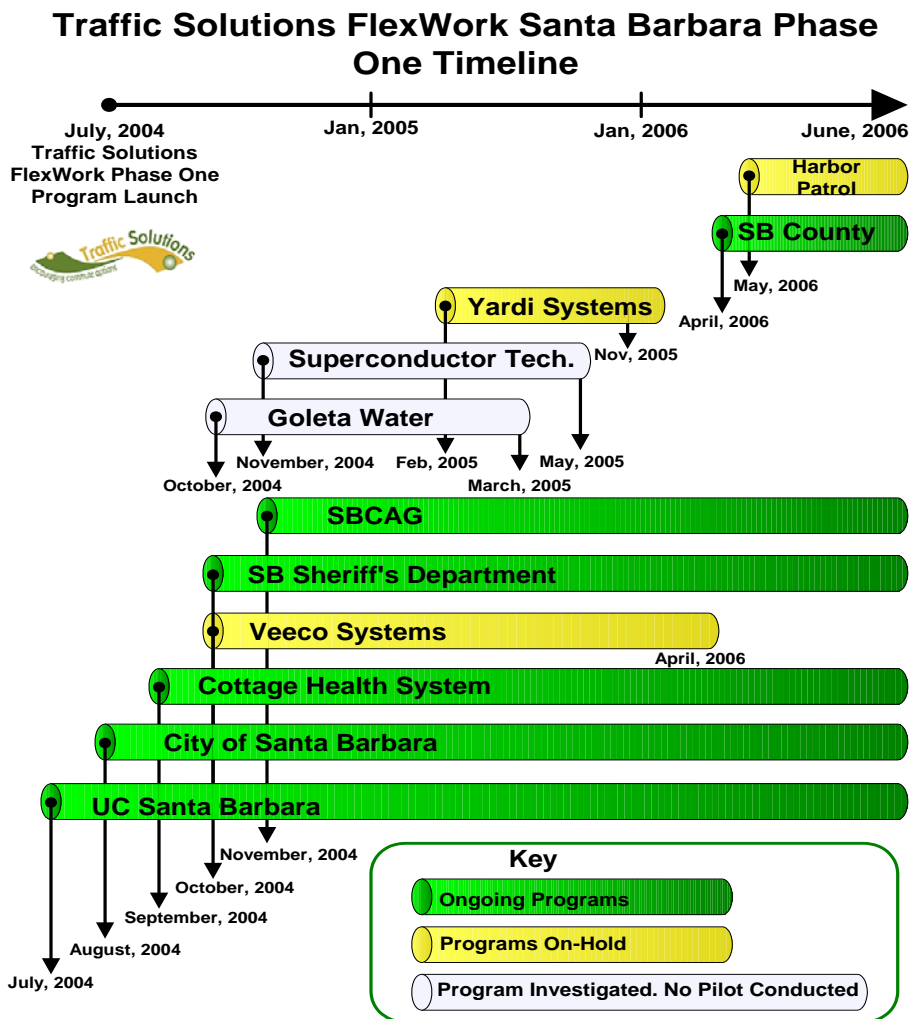
By including a cross-section of organizations, FlexWork SB Phase I program results would more readily prove the concept to a variety of private and public organizations.

- 2) Recruit the largest public sector employers to insure a broad, coordinated effort to reduce traffic congestion and improve air quality along the north and south Highway 101 corridor.
  - a. The University of California Santa Barbara, (UCSB), is the County's largest employer and a highly visible organization. Including UCSB in the program raised the "profile" of the effort and provided a source of significant participation numbers.
  - b. The County of Santa Barbara is the largest government agency and one of the largest employers in the county, with a workforce with a wide range of job types and work sites throughout the county. As the County already had a telecommuting policy in place, our goal was to identify what was needed to expand participation across various forms of flexwork.
  - c. The City of Santa Barbara, like the County, is another large employer and should be actively addressing issues facing the region. The City also had a telecommuting policy and program although participation was low.
- 3) Develop TAG's "Flexwork Fundamentals" workshop to be held for the public. This workshop was held once in July and again in early August and was open to the public. Through SBCAG's organizational contact list, radio ads and phone calls TAG recruited representatives to the workshops in order to promote the flexwork concept and FlexWork SB Phase I program. The City and County of SB, Veeco Systems, UCSB and Cottage Health were all originally introduced to the FlexWork SB Phase I program through these workshops.
- 4) Deliver customized consulting, on-line tools and training. TAG varied the strategy and content according to what different organizations needed to implement an effective flexwork program. Some influential factors included:
  - a. Experience with a previous or existing flexwork program.
  - b. Existing policies, guidelines, and information on flexwork.
  - c. Types of benefits sought by the organization and/or issues the organization is trying to address with the program (e.g. productivity gains, employee retention, office space relief, etc.).
  - d. Experience and perceptions of the organization's supervisors and managers, a key aspect to the acceptance and sustainability of a program.
  - e. Develop and track metrics around participation, for input into the business case.
- 5) Compile pilot program data, assess the benefits and outcomes of the program and develop case studies for making the business case for other employers in Santa Barbara County.

### **FlexWork SB Phase I Program Participants and Project Timeline**

Traffic Solutions and TAG worked with the following organizations during the FlexWork Phase I program. Participation dates and additional details are included in the timeline below.

- ♦ Cottage Health. (Telework)
- ♦ Veeco (Telework)
- ♦ Superconductor Technologies (All Flexwork)
- ♦ UCSB (All Flexwork)
- ♦ The City of Santa Barbara (All Flexwork)
- ♦ The County of Santa Barbara Sheriff's Department (Telework)
- ♦ Goleta Water (All Flexwork)
- ♦ Yardi Systems (All Flexwork)
- ♦ SBCAG (All Flexwork)



### FlexWork SB Phase I New Participants

Towards the end of the first phase of the FlexWork Santa Barbara Program two organizations approached Traffic Solutions. The initial stages of their programs have begun.

The County of Santa Barbara Human Resources Department began their investigation in earnest in April of 2006. The County Sheriff's Office provided an invaluable pilot and was chosen as a non-traditional pilot for the overall County. The inclusion of the rest of the County provides a significant opportunity to significantly expand overall participation, trip reductions and emission reductions. The County as a whole is particularly interested in how flexible schedules could help reduce the County's impact on peak period congestion on Highway 101. Due to the location of many of the County's offices, flexwork will also help reduce the pressure on downtown Santa Barbara parking during peak tourist season. Productivity gains, employee retention and recruiting and employee satisfaction with the County are also short-term goals for implementing flexwork more extensively.

The Santa Barbara Harbor Patrol began initial discussions with TAG, Traffic Solutions and TDM from the City in May of 2006. The Harbor Patrol is looking to move from a traditional, three eight hour shift to a compressed workweek model. This will allow employees to get out of the commute, provide additional manpower during peak times of need and to augment employee training and conditioning.

Some preliminary assistance was offered to these organizations, however due to the limited time and resources available under Flexwork Phase I program, any further assistance will need to take place under the FlexWork Phase II program.

### **FlexWork SB Phase I Program Consulting Components**

The main components of each program included a set of foundational items, tools and trainings. Samples of these tools are included in Appendix B. The following is a list of the primary consulting tools provided to the pilot participants as the key role each play in an effective flexwork/telework program:

- 1) **Flexwork Policy.** The flexwork policy includes the expectations of employees who wish to participate in a flexwork program, the criteria for inclusion, performance requirements, the acquisition and care for equipment, supplies, software and other materials and any legal requirements of the organization.
- 2) **Flexwork Agreement.** The flexwork agreement provides the details for each flexwork participant. The timeframe of their program, where they will work if not on-site, their schedule, performance criteria while flexworking, who pays for equipment that is required, how equipment maintenance is affected and who is required to approve the program. The agreement is often the primary way of tracking employees' participation in a flexwork program.
- 3) **On-line Survey,** (for managers or all employees). The on-line surveys are an efficient and effective way to obtain information about employees' attitudes towards flexwork, prior experience and their intentions to participate. For managers a survey may also provide information about what goals they believe are attainable and what concerns need to be addressed to obtain their support for the program.
- 4) **Flexwork/Telework Website**
  - a. **Work Suitability Assessment,** (WSA). The WSA is an on-line, interactive, real-time tool that helps an employee determine which job-tasks are most suitable for the various types of flexwork available to them. At the end of this process the employee will have determined if their job-tasks are suitable to

flexwork, which are most suitable, what performance measures will help their manager evaluate their performance while flexworking and a suitable workgroup schedule.

- b. **Employee Suitability Assessment, (ESA).** The ESA is an on-line assessment that evaluates an employee's competency to telework/telecommute in six critical areas. Personal competencies such as Communication Skills, Results Management, and Remote Relationship Management are evaluated. The employee is provided with a report, scores for each competency and ways in which they can develop each competency.
- c. **Employee tools and information.** "How-to" checklists and flowcharts, assistance in using the on-line tools and assessments, how to work with their manager in designing a program and general employee information help the employee determine their most effective flexwork program.
- d. **Managers' tools and information.** Information on collaborating with an employee to design a flexwork program, how to evaluate a program and how to use the on-line tools and assessments make the manager's job of evaluating a program more effortless.
- e. **General flexwork/telework information.** Information about other programs, the "myths of telecommuting" FAQ's and other information assist both the employee and manager.
- f. **Access to organization specific information.** Software, remote access, etc. that is unique to the organization. For example, many organizations have licensing contracts with Microsoft making it simple and inexpensive to upgrade the software on their computers.

- 5) **Manager Workshops.** Manager workshops are in-person workshops designed to make managers familiar with the flexwork program, the policies, agreement, on-line tools and other processes, to address their concerns and questions and make them familiar with new types of situations they may experience.

## **FlexWork SB Phase I Outcomes and Performance Measures**

Following are charts detailing the participation and emission reductions of the participants of the Flexwork Santa Barbara Phase I Program. TAG works with its clients with a standardized approach and foundational set of processes and tools. During the initial stages of a program this standardized approach is customized for the needs of each client. As a result, different programs vary in terms of the processes and tools they use and their rollout of a flexwork program. The various types of organizational rollouts and types of flexwork programs utilized by participants resulted in different impacts on reduced commute trips, traffic congestion and air emissions. The following terms were used.

**Pilot Program:** Some participating organizations utilized pilot programs that included specific workgroups or divisions and were set for a limited time. These organizations collected data in terms of participation in the program.

Other organizations did not have a specific program. These organizations rolled the program out to the entire organization.

**Pilot Expansion:** Each organization had a period either after their pilot, or their organizational rollout that we termed the pilot expansion. During this period adjustments were made based on the pilot or rollout and typically employee participation accelerated. Several organizations, including UCSB and the City of Santa Barbara, conducted additional manager orientation workshops. Remaining manager resistance declines and employee interest increases during this period during a successful program.

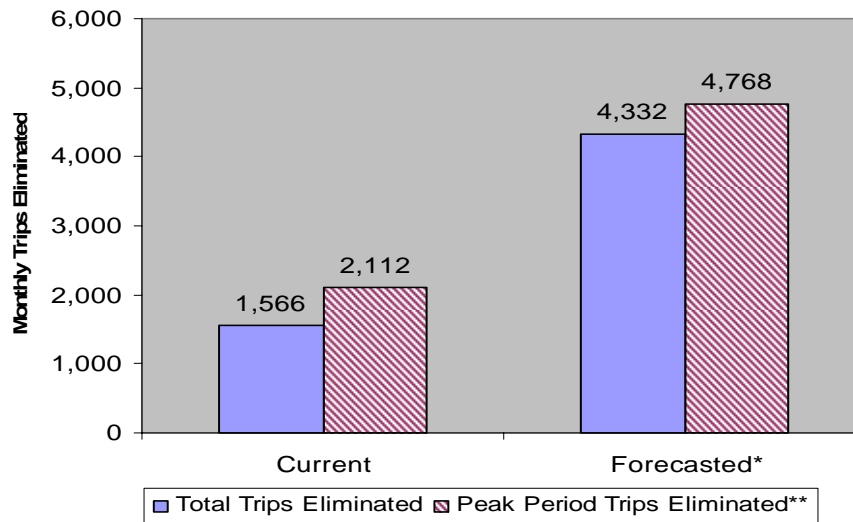
**Projected Numbers:** Projected numbers are forecasts for the organization as the program reaches maturity. These numbers are typically based on the pilot and pilot expansion data, on-line survey data as well as data from case-studies of similar organizations with mature programs.

**Peak Commute Trips Eliminated:** Several of the organizations tracked the participation of employees utilizing flexible schedules. Flexible schedules have the benefit of moving an employee from the peak commute times to off-peak times. While we do not experience the benefit of a reduced automobile trip, we do experience the benefits of removing that automobile from the peak commute and reducing air emissions raised due to stop-and-go traffic.

Performance Measure	Phase I (Monthly)	Projected (Annual)
# Participants	363	846
# Trips Eliminated (telework)	1,566	51,984
# Peak Commute Trips Eliminated (flexible schedule and telework)	2,112	57,216
Vehicle Miles Traveled Eliminated	46,980	1,559,520
Pollutant Emissions Saved:		
ROG (Lbs)	6,821	733,764
NOx (Lbs)	6,115	657,720
CO (Lbs)	66,280	7,129,704
PM10 (Grams)	73,499	7,906,368
CO2 (Lbs)	1,706,403	183,556,896
Gasoline Saved, (est. 25 miles/gallon)	1,879	62,376
Employee Auto Savings, (IRS 44.5 cents/mile est.)	\$20,906	\$693,984

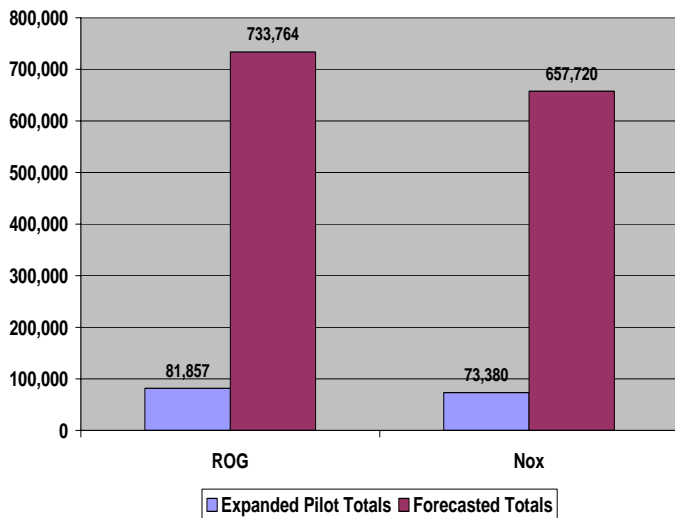


## Monthly Trip Reductions

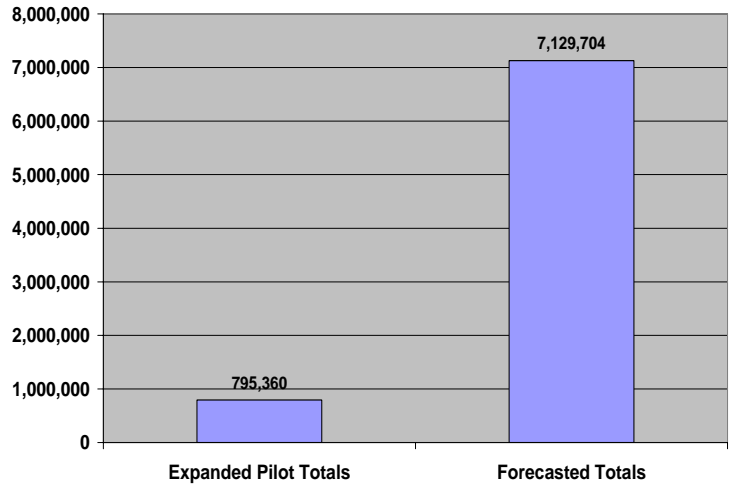


\* Forecasted monthly totals are likely to be reached within 2 years once the pilot programs fully mature. Total annual peak period trips eliminated forecasted to be 57,216.

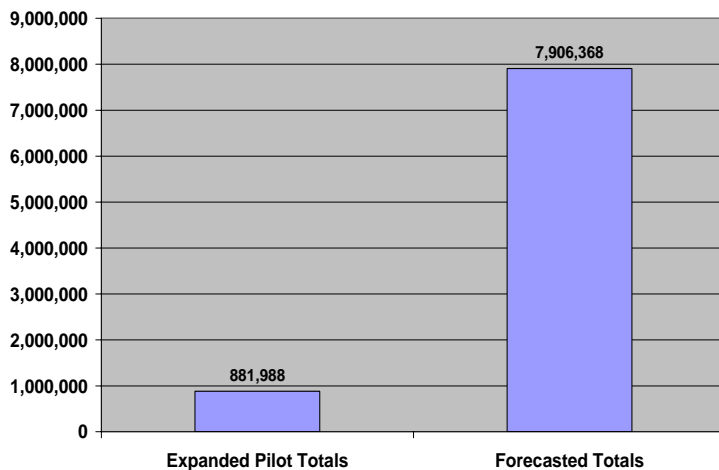
## ROG, NOx Emission Reductions, (Pounds/Year)



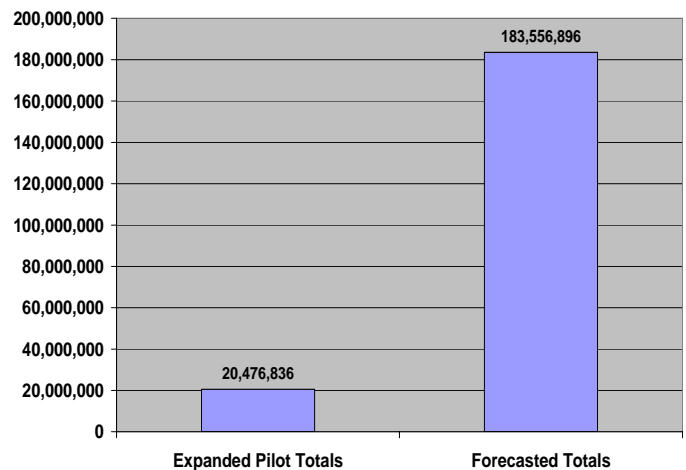
## CO Emission Reductions, (Pounds/Year)



## Particulate Emission Reductions, (Grams/Year)



## CO2 Emission Reductions, (Pounds/Year)



**Final Notes:**

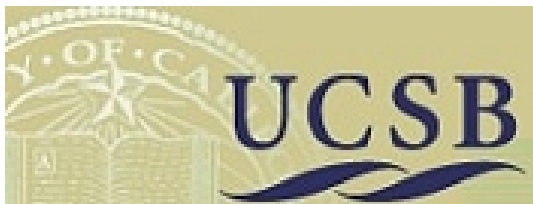
The SB Sheriff's Department already heavily utilizes several compressed workweek schedules. This benefits the County in terms of reduced trips and non-peak commute travel, but these numbers were not included in the data. Only new flexwork participants due to the Flexwork Phase I Program were included.

The City of Santa Barbara also had a significant number of flexworkers, mainly those utilizing compressed workweeks and flexible schedules. Again, these employees were not included in the Flexwork Phase I Program numbers.

Cottage Health is preparing to launch its telecommuting pilot. As the results of the pilot and expanded pilot, will have a significant impact on which workgroups will join their program in the future. We did not include a forecast number for Cottage Health. Thus, the potential for a significant boost to forecasted trip and emission reduction numbers is very feasible.

Due to confidentiality reasons, program information from Yardi was not released.

# University of California Santa Barbara



*"Flexwork is the biggest hassle that isn't."* – Flexwork Steering Committee Member

<b>Start Date:</b>	<b>5/18/2004</b>
<b>Type(s) of Flexwork:</b>	<b>Telework Compressed Workweeks Flexible Schedules</b>
<b>Program Goals:</b>	<b>Employee Retention Employee Recruiting Employee Work/Life Balance Productivity Gains Reduce Parking Congestion</b>
<b>Main Hurdle:</b>	<b>Developing a Program that Managers/Supervisors Actively Promote</b>
<b>Biggest Surprise:</b>	<b>Manager Post Pilot Involvement</b>
<b>Flexwork Pilot:</b>	<b>7/01/2005 – 10/30/2005</b>
<b>Program Rollout:</b>	<b>3/02/2006</b>

## About the University of California Santa Barbara:

UCSB's enrollment in 2005 included 19,799 students pursuing more than 200 majors, degrees, and credentials that are offered through UCSB's five schools and the Graduate Division.

UCSB's has 975 FTE faculty members and a total of 6,005 FTE employees. In addition to five winners of Nobel Prizes, UCSB's faculty includes many elected members or fellows of the American Academy of Arts and Sciences (21), the National Academy of Sciences (25), the National Academy of Engineering (26), and the American Association for the Advancement of Science (38).

A UCSB Work/Life Survey was conducted in 2002. Staff cited the ability to have flexible work arrangements as the single most important need in trying to balance work/life issues. The results of that survey indicated that 87% of female staff and 92% of male staff were moderately to very interested in flexible work arrangements. In December 2002, the Chancellor asked Human Resources to develop a program to increase the use of flextime and telecommuting for staff.



In 2003, UCSB was invited to join a Telework Task Force group headed by the Traffic Solutions division of the Santa Barbara County Association of Governments (SBCAG). UCSB was the first pioneering organization to join the Flexwork SB program. UCSB's pilot flexwork program was launched on July 1st, 2005 and the full program was rolled out on January 15th, 2006.

## UCSB's Flexwork Program Goals:

The goals for flexwork developed after the 2002 work/life study were based on studies that showed that flexible work arrangements improve morale, quality of life, and productivity by taking into account each employee's individual differences in work styles, optimal work times, family responsibilities, and personal and career interests. As a result, planned and unplanned absences are reduced and fewer personal tasks are done during the employee's workday. In times of budget cuts and downsizing, flexwork arrangements can be an effective and low/no-cost method that employers can offer to assist employees with work/life needs.

By offering its employees the option of flexwork, (flex schedules), the goals of the program are to promote better work/life balance for its employees, to benefit the Santa Barbara community through less traffic congestion and air pollution, and to realize productivity gains for the University.

UCSB implemented flexible-schedules, telework and compressed workweeks as options for all of its employees in the four workgroups who participated in the pilot. Later, the program was announced to the entire campus and trainings were offered to managers and supervisors who were interested in offering the program to their departments.

### **UCSB's Flexwork Pilot Program:**

The UCSB Flexwork Pilot Program was conducted in the late summer/early fall of 2005. The pilot was designed to include departments that provided a cross-section of job-tasks for the University. The four-month pilot program ran from July 1, October 30. There were four participating pilot departments: Admissions, Human Resources, Information Systems & Computing, and Physics. Out of the 139 employees in the participating departments, 37 employees filled out a flexwork agreement approved by their supervisor and department head.

- ♦ Through the use of on-line surveys determine the impact of the flexwork pilot on flexworkers job satisfaction, performance and effects on managers and co-workers of flexworkers.
- ♦ Demonstrate that a formalized, structured telecommuting program would increase overall participation.
- ♦ Gather evidence of increased employee performance,
- ♦ Develop a process by which telecommuting could be used to augment employee recruitment.

### **UCSB's Flexwork Pilot Outcomes:**

The pilot departments for the Flexwork Pilot Program were Admissions, Human Resources, Information Systems & Computing, and Physics. The composition of these departments is:

<b>Department</b>	<b>Total # of Employee</b>	<b># of Exempt Employees</b>	<b>% of Exempt Employees</b>	<b># of Non-Exempt Employees</b>	<b>% of Non-Exempt Employees</b>
Admissions	39	11	28%	28	76%
Human Resources	35	23	66%	12	34%
Information Systems and Computing	34	11	50%	17	50%
Physics	42	12	28%	30	71%
Total	150	63	42%	87	58%

Twenty two (22) pilot participants had schedules with flexible hours (e.g. early start/early finish or late start/late finish). Seven employees had a telecommuting arrangements and 8 employees worked compressed work weeks (e.g. 9/80 schedule). Eight of the Flexwork Pilot participants were on the START program. Twelve participants had a "mixed" schedule comprised of telecommuting/ compressed work week/flexible hours.

### **Effect on Parking, Commutes, and Highway Congestion:**

Twelve (32%) of the participants lived in Santa Barbara, 24% (9) lived in Goleta, 11 (30%) lived in North County (Buellton, Santa Ynez), and 5 (14%) lived in South County (Ventura, Ojai). Participants with flexible work hours helped reduce the peak hour congestion on the 101 coming into and going out of campus. Telecommuting and compressed work weeks reduced the need for 68 parking spaces, though most of those spaces were on Fridays.

### **Impact on Pollution and Gas Savings:**

The pilot participants reduced gas emission particulates by 30,414 pounds per week. Gas emission particulates are comprised of large amounts of CO<sub>2</sub>, as well as various Nitrous Oxide particles. These calculations are based on a formula developed by the Environmental Protection Agency and modified by the State of California to meet our specific weather and environmental factors. The seven (7) telecommuting participants averaged 31.4 miles each way and the eight (8) participants using compressed work weeks averaged 32.9 miles each way. Participants who lived within twelve (12) miles of UCSB saved an average of \$19.07 in gas expenses and \$57.03 in operating costs per month. Participants who lived further than 30 miles from UCSB saved an average of \$54.25 in gas expenses and \$152.06 in operating costs per month.\* Nine (60%) of the employees using telecommuting or compressed work weeks lived within ten (10) miles of UCSB. The benefits for these participants appear to be work/life balance and the ability to work a limited amount of time in a non-disruptive work environment, rather than reduction in commute time or gas savings.

### **Flexwork Pilot's Impact on Department Functioning:**

The highest number of respondents (approximately 53%) reported that working with new flexwork participants had no impact on their ability to get their work done, timeliness and quality of work received from flexworkers, and ease of contacting flexworking co-workers. More importantly, 40% said that there was a very positive impact on the quality of work received from flexworkers. 20% of the respondents reported that there was a somewhat negative impact on ease of contacting flexworkers, while 18% of the respondents reported a positive impact on the same issue. 31% of the respondents indicated that there was a positive impact on his/her ability to get work done and 33% of the respondents reported a positive impact on the timeliness of work received from flexworkers. Generally, there was either no impact or a positive impact on department functioning due to flexworking employees.

<b>Impact of Flexwork on Non-Flexworkers</b>			
	<b>% negatively impacted</b>	<b>% not impacted</b>	<b>% Positively impacted</b>
<b>Ease of Contacting Employees</b>	20%	49%	18%
<b>Ability to Get My Work Done</b>	10%	56%	31%
<b>Timeliness of Work Received from Flexworkers</b>	12%	48%	33%
<b>Quality of Work Received from Flexworkers</b>	4%	57%	40%

### Flexwork Pilot's Impact on Individual Productivity and Morale:

In both the pre-survey and the post-survey results, having flexibility in their work schedule positively affected morale in a large majority of survey respondents (90% in pre-survey, 86% in post-survey). Having work schedule flexibility also positively affected productivity in over half of survey respondents (76% in pre-survey, 60% in post-survey).

Positive Impact of Flexible Work Schedules of Flexworkers				
	# who reported flexibility affected them very little	% who reported flexibility affected them very little	# who reported flexibility affected them very much	% who reported flexibility affected them very much
<b>Productivity</b>	23	14%	<b>34</b>	<b>60%</b>
<b>Morale</b>	8	40%	<b>48</b>	<b>86%</b>
<b>Absenteeism</b>	30	54%	<b>26</b>	<b>46%</b>
<b>Quality of Work</b>	29	52%	<b>27</b>	<b>48%</b>
<b>Likelihood of Quitting Job</b>	32	58%	<b>23</b>	<b>42%</b>
<b>Likelihood of Being Fired</b>	44	83%	9	17%

### Manager perspectives on flexwork participants:

60% of managers who participated in the Flexwork Pilot Program reported feeling more in favor of flexwork after the pilot was concluded. The only slightly negative impact of flexwork reported by 29% of managers was regarding communication between flexworkers and their co-workers not on flexwork schedules. The results indicate that improved communication between flexworkers, their departments, and the campus will enhance the future success of the program. 76% of the managers reported a positive impact on attitudes towards work, 42% reported a positive impact on productivity, 29% reported a positive impact on quality of work, 29% reported a positive impact on creativity, 47% reported a positive impact on relationships with co-workers, and 41% reported a positive impact on communication.

Impact of Flexwork on Supervisors/Managers			
	% of Supervisors reporting a negative impact on work with flexworking employees	% of Supervisors reporting no impact on work with flexworking employees	% of Supervisors reporting a positive impact on work with flexworking employees
<b>Productivity</b>	0%	59%	42%
<b>Quality of Work</b>	0%	71%	30%
<b>Creativity</b>	0%	69%	30%
<b>Communication With Co-Workers</b>	29%	29%	<b>41%</b>
<b>Attitude Towards Work</b>	0%	24%	<b>76%</b>
<b>Relationship With Co-Workers</b>	6%	47%	<b>47%</b>

**Written Comments:**

Some of the questions in the pre and post surveys were open-ended and respondents were asked to express their opinions on flexwork issues. Many of the comments indicated that quality of life, commute times, morale, and increased productivity were positive outcomes of having a flexwork schedule. Some employees who did not participate in the Flexwork Pilot Program commented that they occasionally had to handle walk-in traffic and/or telephone calls for flexworkers and communication/coordination of flexworkers' schedules was an issue at times. In general, most of the comments were very positive about the impacts of flexwork on individual and department functioning.

**Long-term goals for the flexwork program:**

- ♦ Include flexwork options in the recruitment of new employees.
- ♦ Gather data on the financial savings of utilizing flexwork in the recruitment of new employees.

**Significant Hurdles to Implementing:**

- ♦ Approval of guidelines, agreement and other documents through University departments, management and union.
- ♦ Supervisor and management resistance, mainly based on the informal use of flexwork arrangements on campus.

**Biggest Surprises:**

- ♦ Over 100 supervisors and managers who attended the six Flexwork Manager Trainings conducted by Wendy Nishikawa.
- ♦ Surges in enrollment after each Flexwork Manager Training showing how critical management support is to employee enrollment.
- ♦ A steady stream of new applicants, from six to fourteen per week, since the program was launched.

**Key FlexWork Policies and Tools:**

The tools developed for this program included a UCSB Flexwork web site, written guidelines, and an agreement form. The web site provided access to policies, assessments, guidelines, and information and had components specifically for the department manager or the flexworker. The guidelines met the goals of the program for the University of California and the specific needs of our campus. These included eligibility requirements for the program, policies around obtaining and maintaining equipment and supplies, data security, usage of equipment, off-site office safety, and ergonomic guidelines. The agreement included employee information, and details on their specific flexwork program (e.g. dates, location, etc., duties to be performed while flexworking, system access and technical support, types of hardware, software, supplies and other items needed for the flexwork arrangement).

- ♦ Written guidelines and an agreement form.
- ♦ On-line Work Suitability Assessment (WSA).
- ♦ On-line Employee Suitability Assessment (ESA).
- ♦ On-line surveys
- ♦ A UCSB Flexwork website.
  - ♦ Access to guidelines and agreement form.
  - ♦ On-line assessments.
  - ♦ "How-to's" for managers and employees.
  - ♦ Additional flexwork information.

**Key Statistics:****49 employees participated in UCSB's flexwork pilot**

- ♦ 7 Telecommuters
- ♦ 8 Compressed Workweeks
- ♦ 22 Flexible Schedules
- ♦ 12 Mixed Flexwork Schedules

**\*257 flexworkers as of June 30<sup>th</sup>, 2006**

- ♦ 42 Telecommuters
- ♦ 49 Compressed Workweeks
- ♦ 108 Flexible Schedules
- ♦ 58 Mixed Flexwork Schedules

**\*\*526 Projected flexworkers**

- ♦ 120 Telecommuters
- ♦ 180 Compressed Workweeks
- ♦ 156 Flexible Schedules
- ♦ 75 Mixed Flexwork Schedules

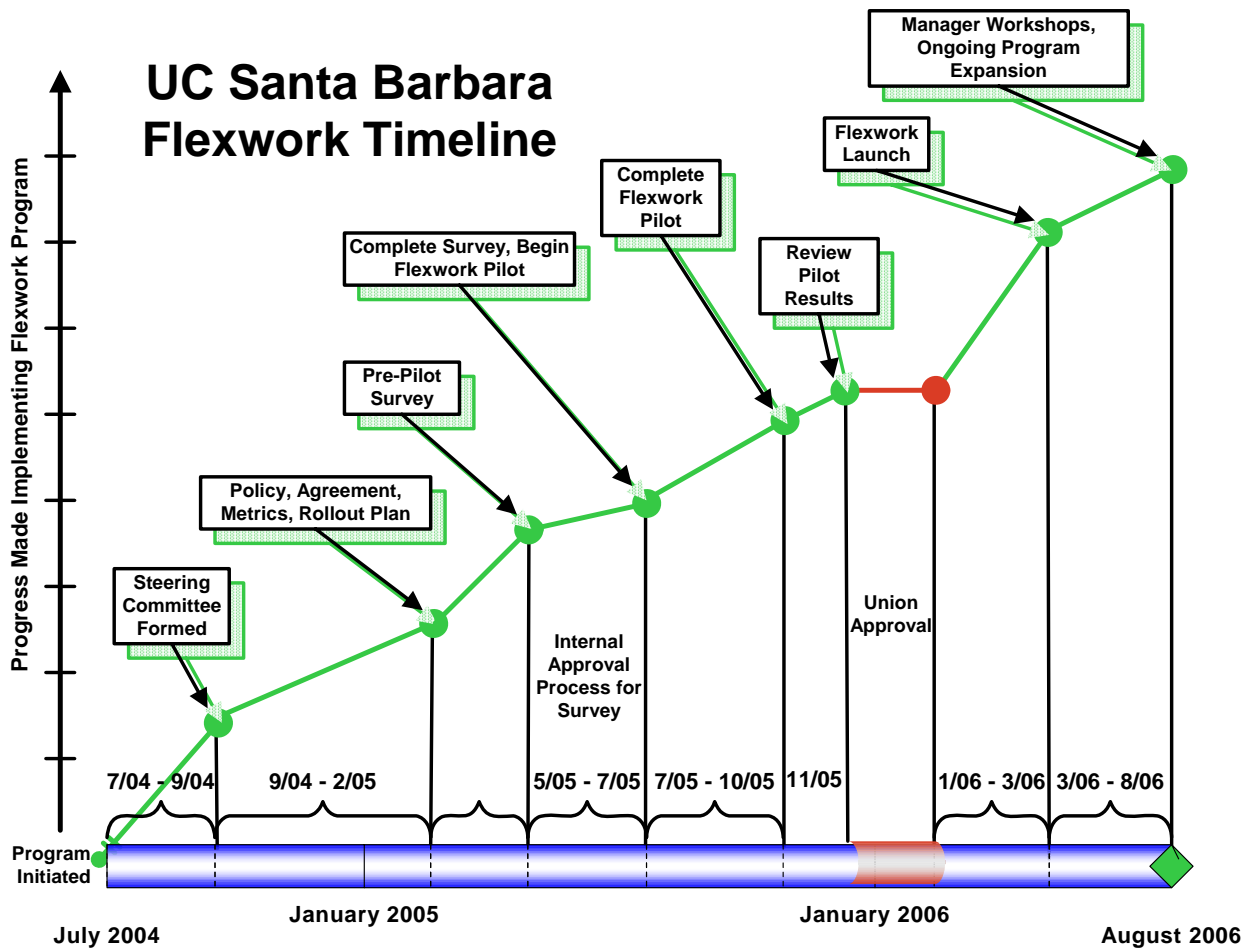
\* The total number of flexworkers and the participation by type are estimated from files downloaded from UCSB's flexwork website, usage of the Work Suitability and Employee Suitability Assessments and statistics from the flexwork pilot program.

\*\* The projected number of teleworkers are estimated by participation numbers at other University flexwork programs that have been in place a minimum of two years, (University of Central Washington, Long Beach, Iowa, Poznan).

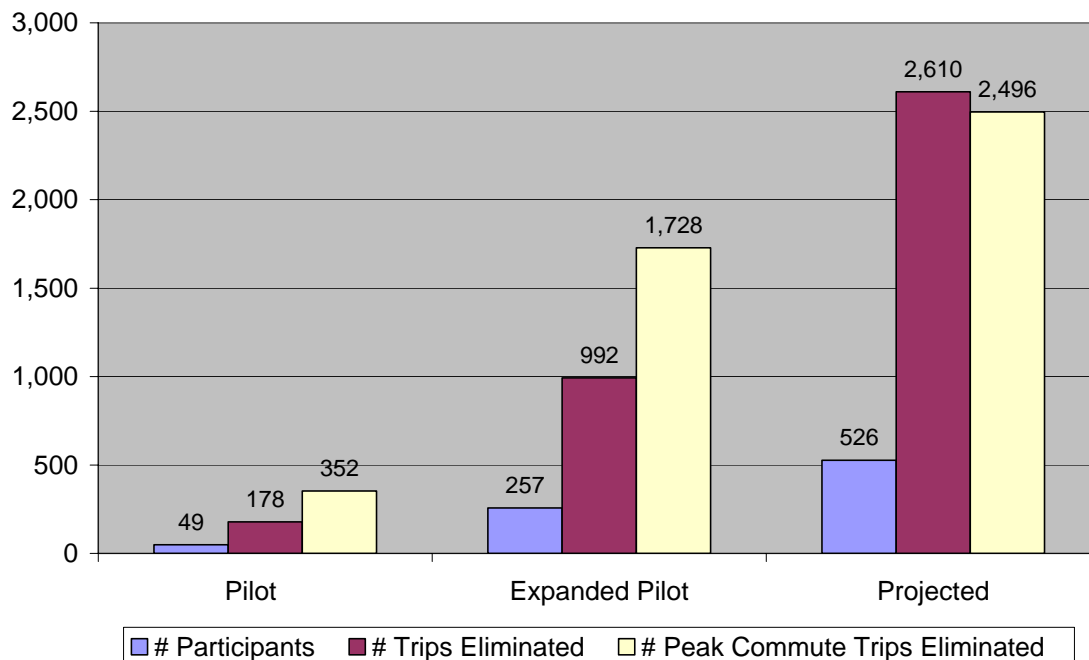
**Next Steps**

- ♦ Manager trainings will be offered upon request





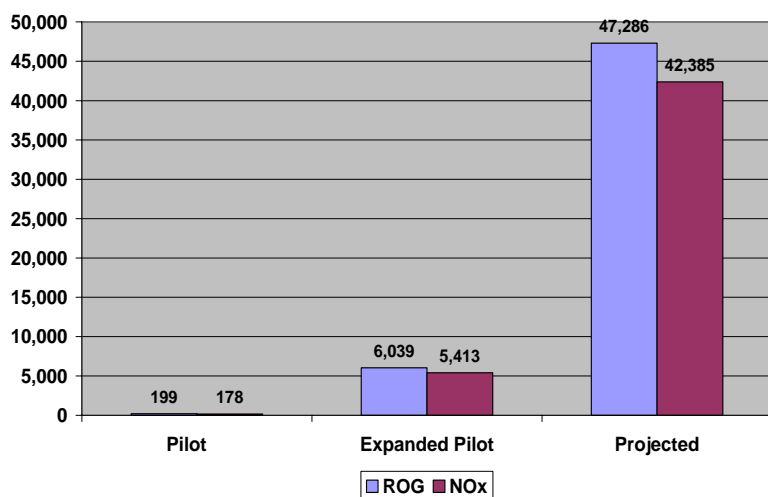
**Participation and Traffic Reduction, (Monthly)**



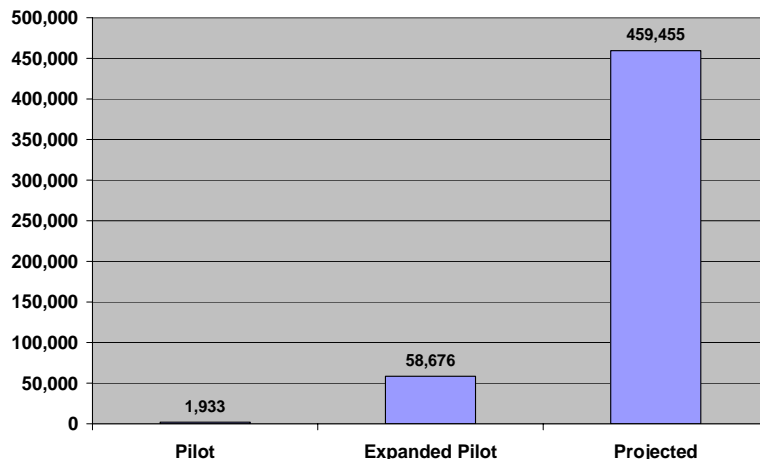
## Participation and Emission Reductions Data, (Monthly)

	Pilot	Expanded Pilot	Projected
ROG, (Pounds)	199	6,039	47,286
NOx, (Pounds)	178	5,413	42,385
CO, (Pounds)	1,933	58,676	459,455
Particulates, (Grams)	2,143	65,067	509,505
CO2, (Pounds)	49,760	1,510,625	11,828,832
# Participants	49	257	526
# Trips Eliminated	178	992	2,610
# Peak Commute Trips Eliminated	352	1,728	2,496

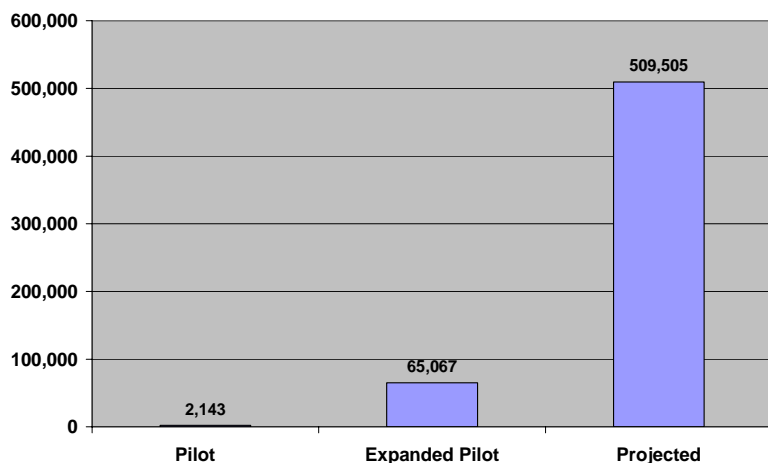
ROG, NOx Emission Reductions, (Pounds/Month)



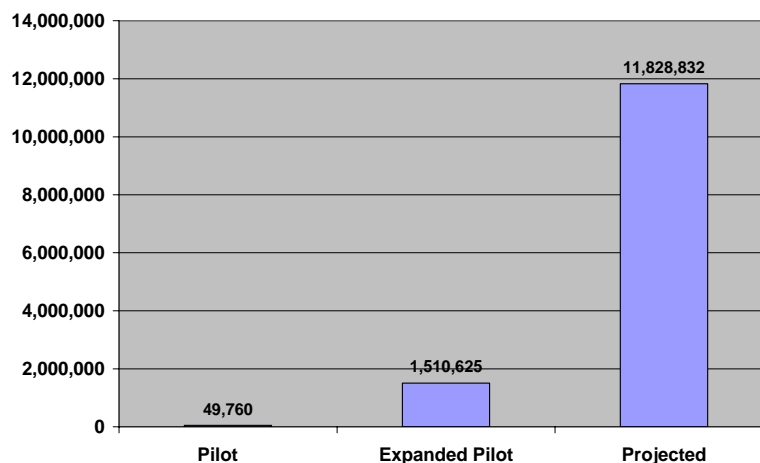
CO Emission Reductions, (Pounds/Month)



Particulate Emission Reductions, (Grams/Month)



CO2 Emission Reductions, (Pounds/Month)



# City of Santa Barbara



*"I was skeptically pulled into [flexwork] by my workgroup. I have to admit its working."* – Supervisor of a City maintenance

<b>Start Date:</b>	<b>7/05/2004</b>
<b>Type(s) of Flexwork:</b>	<b>Telework Compressed Workweeks Flexible Schedules</b>
<b>Program Goals:</b>	<b>Employee Retention Employee Recruiting Employee Work/Life Balance Productivity Gains SOV commute reduction</b>
<b>Main Hurdle:</b>	<b>Developing a Program that Managers/Supervisors Actively Promote</b>
<b>Biggest Surprise:</b>	<b>Manager Support for Program Expansion</b>
<b>Pilot Launch:</b>	<b>8/01/2005</b>
<b>Program Rollout:</b>	<b>1/15/2006</b>

## About the City of Santa Barbara:

Headed by the City Council, which is composed of a Mayor and six Council Members, the Santa Barbara City Government is an organization dedicated to serving the people of Santa Barbara. The City has a broad range of responsibilities in maintaining the city's infrastructure, serving Santa Barbara's citizens as well as to help administer up to 25,000 visitors on weekends. The City employs approximately 1,480 employees.

## The City's Flexwork Program Goals:

Managers of the City recognize that rapid technological advances, regional housing and traffic changes, and employee work/life needs have changed the traditional work environment. It is increasingly possible and mutually beneficial, for both the City and employees, to allow some work to be accomplished at off-site locations and/or during non-standard operating hours.

At the outset of the City's involvement with Flexwork Santa Barbara, a flexible work schedule and telecommuting program already existed as a component of the City's Family Friendly Work Policy. The program was not widely communicated and through an on-line survey it was found that managers and supervisors would feel much more comfortable supporting a program if additional information, tools and trainings were available.

A goal of the flexwork program was to add information, tools and training as well as to rework the City's policy and agreement forms to include a broader range of alternative work arrangements and have the ability to be able to track participation. Additional goals of the program included:

- ♦ Having a positive impact on employee satisfaction.
- ♦ Proving a positive effect on employee performance.
- ♦ Providing a tool for recruitment efforts.
- ♦ Reducing Single Occupant Vehicle trips to the workplace.



After the launch of the flexwork program the City Administrator gave the approval to rework the flexwork components of their TDM program.

#### **The Flexwork Committee:**

Representatives from TAG worked with the City's TDM coordinator, Dru van Hengel, housed in the Transportation Division of the Public Works Department. Representatives from Parks & Recreation; Finance; Human Resources; Information Services; Public Works; and the Library participated in reviewing and revising written agreements and policies, and crafting surveys.

#### **The City's Flexwork Rollout:**

The City's Flexwork Program was rolled out in January of 2006. Prior to the rollout several key activities were completed to ensure an effortless rollout and a sustainable program.

The existing telecommuting policy and agreement was rewritten to include all previous MOA's and aspects agreed to by City managers, unions and other policy makers. Additional guidelines were added for the following reasons:

- ♦ To include compressed workweeks, flexible-schedules and "mixed" flexwork models to the telecommuting policy and agreement.
- ♦ To include aspects that needed additional attention. Examples of these included expectations around handling City equipment and information as well as including Risk Management representatives in the meeting ergonomic and home-office safety and setup requirements.
- ♦ The original telecommuting policy was 22 pages long. If possible, the Flexwork Committee wanted to shorten the document to make it more accessible.

#### **The City Flexwork Website:**

A flexwork website was developed for the City's Intranet. The website consists of areas focused on the employees, (potential flexworkers), managers of flexworkers as well as general information and access to other City resources, software and information. For potential flexworkers the website includes the tools for them to "Make The Case" for their flexwork program. This allows the employee to design the type of program their job is suitable for, their performance metrics, their schedule and other aspects before approaching their manager. Specific aspects of the City's flexwork website include:

- ♦ On-line assessments. The Work Suitability Assessment, (WSA), and Employee Suitability Assessment, (ESA), were included on the flexwork website.
- ♦ "How To" tools for employees.
- ♦ "How To" tools for managers.
- ♦ Additional information about flexwork, ergonomics and home-office setup and safety.

Several updates were presented to Department Heads throughout the program redevelopment, in order to increase awareness that the program was being revised.

A presentation was given at a regularly scheduled quarterly Managers' Meeting. The goals of the program, tools and information available, pilot and rollout plans were communicated to the City's managers. Manager interest in the program was high.

#### **Pre-Launch Flexwork Survey:**

As part of an overall Commute Survey, the employees of the City of Santa Barbara were asked about their perceptions of flexwork, the probability of their participation and the experience of employees already participating in the existing flexwork programs.

When asked if they would choose an alternative work arrangement 31% responded that they like their schedule as it is, over 50% responded that they would move to a compressed workweek, 29% responded that they would telework one or more days per week and 30% would utilize a flexible schedule. It is possible to mix various types of flexwork and utilize more than one.

<b>If available, which of the following alternative work arrangements would you choose? (check all that apply)</b>	
No Change, I like my schedule as it is	<b>31.1%</b>
Change to a 9-80 schedule	<b>22.2%</b>
Change to a 4-10 schedule	<b>28.6%</b>
Telework one or more days per week	<b>28.6%</b>
Lengthen my work day to include a longer lunch break	6.9%
Have flexible start and finish times while still working an 8 or 9 hour day	<b>29.6%</b>
Working fewer hours for less pay	7.9%
Participate in job sharing, (work half time)	5.1%
Work part of the day from home and travel to/from work during light commute times	18.1%
Other (please specify)	12.5%

Well over 50% of the employees responded a positive impact on productivity, morale, reduced absenteeism, quality of work and the likelihood of staying with the City.

***To what extent does having a flexible work schedule and telecommute program affect the following aspects of the City of Santa Barbara as an organization? Flexibility improves:***

<i>Productivity</i>	<b>71%</b>
<i>Morale</i>	<b>93%</b>
<i>Absenteeism</i>	<b>68%</b>
<i>Quality of Work</i>	<b>66%</b>
<i>Likelihood of Staying</i>	<b>91%</b>

**Post Launch On-Line Survey:**

After the program was launched city-wide an on-line survey was conducted. Flexworking employees, their managers, and employees not participating in flexwork were all surveyed to gauge the effects of the flexwork program on their work experience and their perceptions of flexwork.

As the table below shows, the flexwork program had a significantly positive effect on employees' attitude towards the City, the Quality of their work, the ability to be creative, their stress level, job satisfaction and likelihood of staying with the City of flexworking respondents. The only area where there was a negative impact more significant than the positive was in flexworkers' communication with and availability to co-workers.

**For Flexworkers: How Does Flexwork Positively or Negatively Affect Flexworkers In the Following Areas?**

	<b><i>Negatively (%)</i></b>	<b><i>No Impact (%)</i></b>	<b><i>Positively (%)</i></b>	<b><i>N/A (%)</i></b>
My Overall Attitude Towards the City	5	5	<b>80</b>	0
My Communication with/Availability to Co-Workers	<b>37</b>	37	27	0
Quantity of My Work	5	47	48	0
Quality of My Work	6	39	<b>56</b>	0
My Ability to be Creative in My Work	5	37	<b>58</b>	0
My Ability to Hit Deadlines	11	42	47	0
My Timeliness In Responding to Coworkers	21	37	42	0
My Own Stress Level	11	5	<b>84</b>	0
The Cohesion of my Workgroup	5	58	37	0
My Overall Job Satisfaction	6	6	<b>89</b>	0
The Likelihood That I Will Stay Employed at The	5	16	<b>73</b>	5

City				
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\* Some survey recipients did not answer each item resulting in some not equaling 100%.

The flexwork program had a mainly neutral or positive impact on the coworkers of flexworkers, even though they themselves were not participating in the program. The program had significantly positive affects on their overall attitude towards the City, job satisfaction and likelihood of staying with the City. Their ability to communicate with flexworkers was one area in which the negative impact, at 39% of respondents, was more negative than neutral or positive.

**For Co-Workers of Flexworkers: How Does Having Flexworkers in Your Group Positively or Negatively You in the Following Areas?**

	<i><b>Negatively (%)</b></i>	<i><b>No Impact (%)</b></i>	<i><b>Positively (%)</b></i>	<i><b>N/A (%)</b></i>
My Overall Attitude Towards the City	9	18	<b>68</b>	5
My Ability to Communicate With Flexworkers	<b>39</b>	28	23	9
My Availability to Coworkers and Customers	30	33	25	12
The Number of Unscheduled Tasks That Come Up For Me To Do During The Day	24	52	12	12
The Quantity of Work I Am Able to Get Done	7	69	15	10
The Quality of My Work	2	71	17	10
My Ability to be Creative in My Work	0	69	22	10
My Ability to Hit Deadlines	15	59	17	10
My Timeliness In Responding to Coworkers	29	52	9	10
My Own Stress Level	10	55	29	7
The Cohesion of my Workgroup	21	40	31	7
My Overall Job Satisfaction	10	40	<b>43</b>	7
The Likelihood That I Will Stay Employed at The City	0	43	<b>53</b>	5

**Future Participation:**

16% of the respondents indicated that they have the intention of applying for a flexwork program in the near future.

**Impact on Managers of Workgroups with Flexworkers:**

36% of managers responding to the survey stated that they were more supportive of flexwork since the flexwork pilot and rollout were conducted. 42% stated that it had no impact and 4.5% were more negative about flexwork.

Managers rated that the flexwork program had a positive impact on flexworker productivity, attitude and workgroup cohesiveness rather than a negative or neutral impact.

87.5% of managers were supportive of the expansion of the flexwork program in their workgroup and the organization. 9% were more supportive in the organization but not in their workgroup. None of the managers responded that they would not support the flexwork program anywhere in the City.

**The long-term goals for the flexwork program include:**

- ◆ Include flexwork options in the recruitment of new employees.
- ◆ Gather data on the financial savings of utilizing flexwork in the recruitment of new employees.
- ◆ Gather data on the personal savings of employees utilizing Flexwork.
- ◆ Increase participation of existing employees in Flexwork.
- ◆ Remove culture of fear around submittal of future applications.

**Significant Hurdles to Implementing:**

- ♦ Change the culture of management staff to seriously consider all applications.
- ♦ Finding a “home” for the program.

**Biggest Surprises:**

- ♦ Even after the City-wide rollout, many respondents to the survey indicated that flexible work and telework schedules were still not available to them.
- ♦ The high level of support for the expansion of the program. Not only among employees, but overwhelmingly among supervisors and managers as well.

**Key FlexWork Policies and Tools:**

The tools developed for this program included a City Flexwork web site, written guidelines, and an agreement form. The web site provided access to policies, assessments, guidelines, and information and had components specifically for the department manager or the flexworker. The policy and agreement met the needs of employees and managers involved in the flexwork program. These included eligibility requirements for the program, policies around obtaining and maintaining equipment and supplies, data security, usage of equipment, off-site office safety, and ergonomic guidelines. The agreement included employee information, and details on their specific flexwork program (e.g. dates, location, etc., duties to be performed while flexworking, system access and technical support, types of hardware, software, supplies and other items needed for the flexwork arrangement). The on-line surveys were critical components for the investigation, development, and on-going expansion and “tweaking” of the flexwork program.

**Key Statistics:**

The City of Santa Barbara already had a flexwork program. Participation was difficult to track as the program was relatively informal. The data we are using for the “through June 30th” numbers include new flexworkers as of January 2006.

**New Flexworkers During Pilot Expansion:**

- ♦ 9 new Teleworkers
- ♦ 16 new Compressed Workweeks
- ♦ Employees utilizing flexible schedules are not required to fill out flexwork agreements. An estimated 24 new flexible schedules are in place based on interviews with managers and data from the on-line surveys.

The forecasted number of flexworkers are based on the pre-pilot survey and data acquired from flexwork program in other cities within California and the U.S. These numbers do not include City employees flexworking prior to January 1st, 2006, estimated at 242. The most common flexwork arrangement currently in the City are compressed workweeks. As a result, the number of potential new employees utilizing this arrangement is not as dramatic.

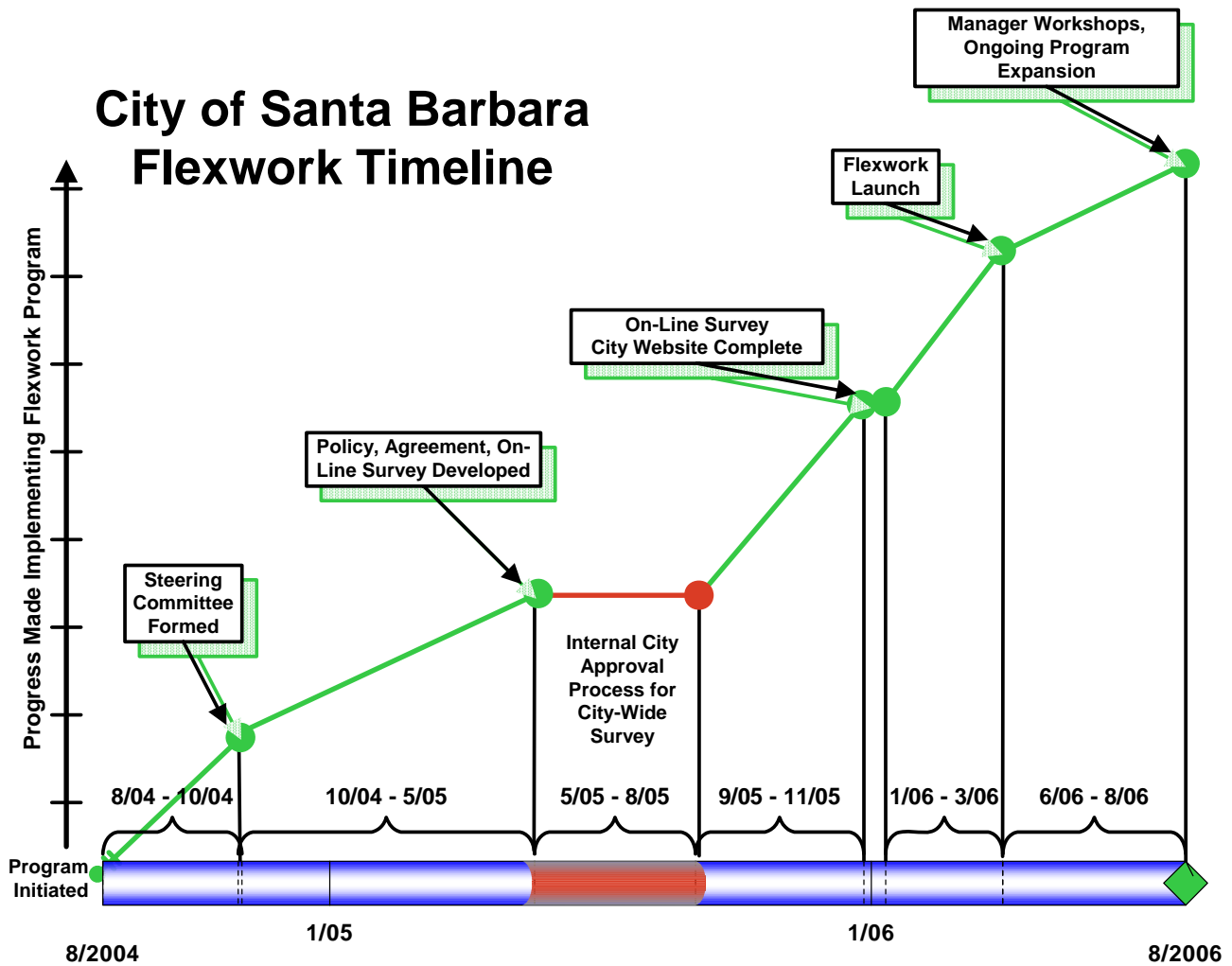
**Forecasted Teleworkers:**

- ♦ 53 new Teleworkers
- ♦ 111 new Compressed Workweeks
- ♦ 142 new Flexible Schedules

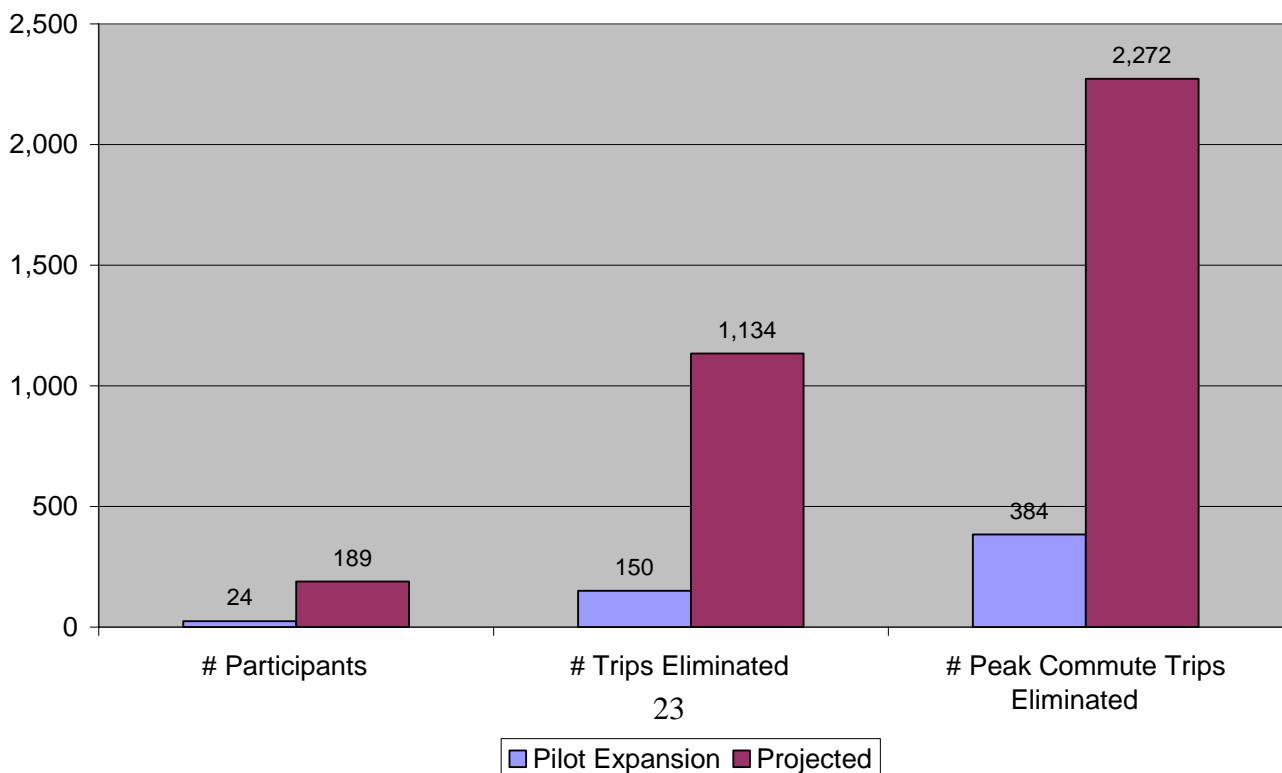
**Next Steps**

- ♦ Additional manager orientations
- ♦ Staff recruitment into program
- ♦ Migration of program into Human Resources Division

# City of Santa Barbara Flexwork Timeline



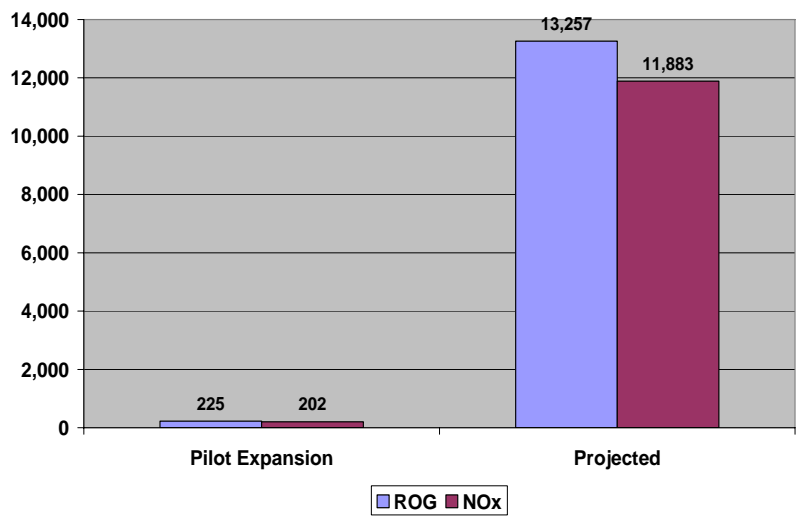
## Participation and Traffic Reduction, (Monthly)



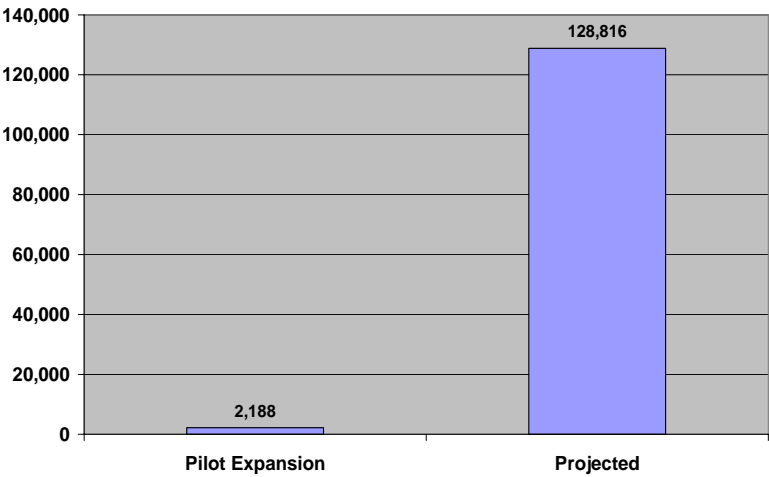


Participation and Emission Reductions Data, (Monthly)		
	Pilot Expansion	Projected
ROG	225	13,257
NOx	202	11,883
CO	2,188	128,816
PM10	2,426	142,848
CO2	56,330	3,316,419
# Participants	24	189
# Trips Eliminated	150	1,134
# Peak Commute Trips Eliminated	384	2,272

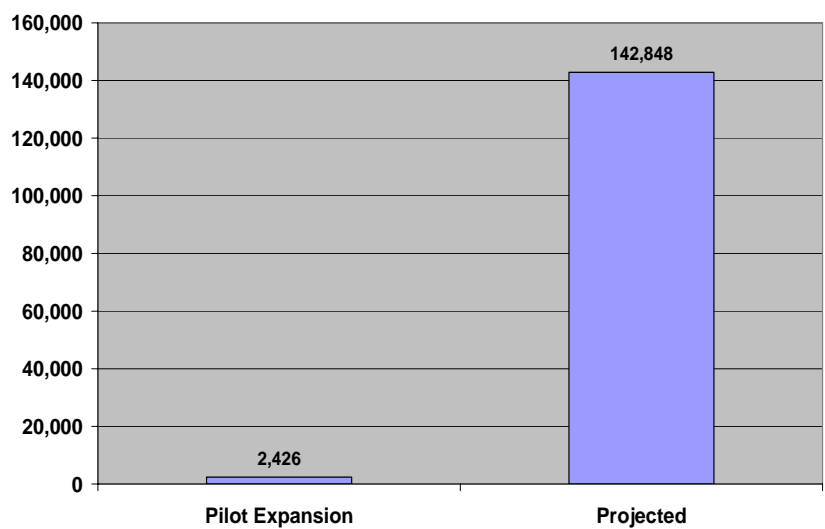
ROG, NOx Emission Reductions, (Pounds/Month)



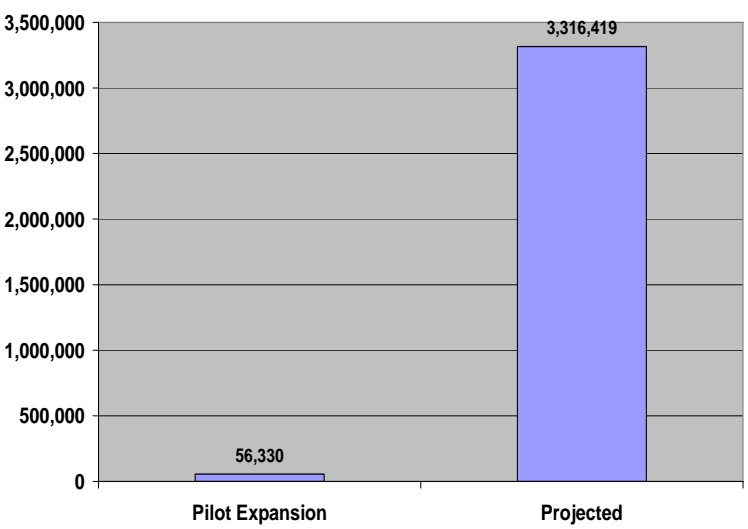
CO Emission Reductions, (Pounds/Month)



Particulate Emission Reductions, (Grams/Month)



CO2 Emission Reductions, (Pounds/Month)



# Cottage Health System



**"The structure of the program helps me feel better about telecommuting as a manager."**  
– CH Manager

<b>Start Date:</b>	<b>9/18/2004</b>
<b>Type(s) of Flexwork:</b>	<b>Telecommuting</b>
<b>Program Goals:</b>	<b>Employee Retention Employee Recruiting Employee Work/Life Balance Productivity Gains Reduce Parking Congestion</b>
<b>Main Hurdle:</b>	<b>Perceptions of Telecommuting within a healthcare organization</b>
<b>Biggest Surprise:</b>	<b>Acceptance of concept by "skeptical" managers</b>
<b>Flexwork Pilot:</b>	<b>8/2006 – 12/2006</b>
<b>Program Rollout:</b>	<b>TBD</b>

## About Cottage Health System:

Cottage Health System, formed in 1996 as the not-for-profit parent organization of Santa Barbara Cottage Hospital (including Cottage Childrens' Hospital), Goleta Valley Cottage Hospital, and Santa Ynez Valley Cottage Hospital is guided by a volunteer board of directors from the greater Santa Barbara community and provides the residents of the Central and South Coast with exemplary health care, continuous improvements in medical practice, and a commitment to our communities. With a combined total of approximately 2,500 employees, nearly 500 beds, over 20,000 annual admissions, over 50,000 annual ER visits and 2,800 births each year, the Cottage Health System hospitals excel at patient care and patient satisfaction. The medical staff of over 500 physicians includes specialists in all major clinical areas, many of whom participate in the training and education of some of the top medical residents in the country in our internal medicine, general surgery, and radiology residency programs. The mission of Cottage Health System is to provide the highest standard of healthcare services through a commitment to continuous improvements in quality, safety, patient satisfaction, health education, research, efficiency, and community health.



## Cottage Health's Flexwork Program Goals:

Cottage Health joined the FlexWork Santa Barbara Phase I Program to reduce the everyday peak period commuting stress on its long distance commuting employees. As a holistic organization focused on every aspect of the health of its patients, Cottage is also committed to the health of its employees. Through their flexwork pilot Cottage Health will be determining the impact on employee turnover and reduced efforts in terms of employee recruitment.

Cottage Health will be making flexible scheduling, telework and compressed workweeks available to all of its employees though some job types will be restricted in the types of flexwork arrangements available to them.

Another outcome of Cottage Health's flexwork program will be reduced office space needs for some of its employees. Combining their flexwork program with an office sharing program will allow these

employees to enjoy an even greater reduction in their time spent “on the road” while providing Cottage Health with an additional return on investment for their flexwork program.

#### **Cottage Health’s Timeline:**

- ♦ Patrice Ryan, Vice President of Human Resources at Cottage Health attended the second Flexwork Fundamentals workshop in July 2004.
- ♦ Participation in the Flexwork Santa Barbara Phase I program was approved and the first meeting was held in September to discuss the program, its outcomes and issues to address.
- ♦ May 2005 the initial policy and finalized goals of the program were complete.
- ♦ July 2005 the telework program was presented to the executive committee and approval was given to continue with the program.
- ♦ September 2005 the implementation plan was complete.
- ♦ Resource issues and the priority of other projects at Cottage Health caused a delay in the program for the remainder of 2005 and the beginning of 2006.
- ♦ Kathryn Rothberg was designated to lead program in February 2006.
- ♦ A telework committee met in May 2006.
- ♦ By June, 2006, the committee had completed the review of the policy and procedures, telework website, on-line tools and pilot program.

#### **Long-term goals for the flexwork program:**

- ♦ Tie telework into the reduction in office space needs.
- ♦ Include flexwork options in the recruitment of new employees.
- ♦ Gather data on the financial savings of utilizing flexwork in the recruitment of new employees.

#### **Significant Hurdles to Implementing:**

- ♦ Devoting the key time and resources within a 24/7 operation to the program.
- ♦ Turnover within the Human Resources department.
- ♦ Significant changes being made to Cottage Health’s employee medical, dental, life and disability programs during the early stages of the program competed for resources.

#### **Biggest Surprise:**

Understanding the amount of details that go into designing a sound and well thought-out comprehensive telecommuting program.

#### **Key FlexWork Policies and Tools:**

Cottage Health System is implementing a Telecommuting web site, written guidelines, and an agreement form. The web site will provide access to policies, assessments, guidelines, and information as well as components specifically for the department manager or the flexworker. The policy includes information around eligibility requirements for the program, performance expectations, policies around obtaining and maintaining equipment and supplies, data security, usage of equipment, off-site office safety, and ergonomic guidelines. The agreement includes employee information, and details on their specific flexwork program (e.g. dates, location, etc., duties to be performed while flexworking, system access and technical support, types of hardware, software, supplies and other items needed for the flexwork arrangement).

#### **Additional tools include:**

- ♦ Written guidelines and an agreement form.
- ♦ On-line Work Suitability Assessment (WSA).

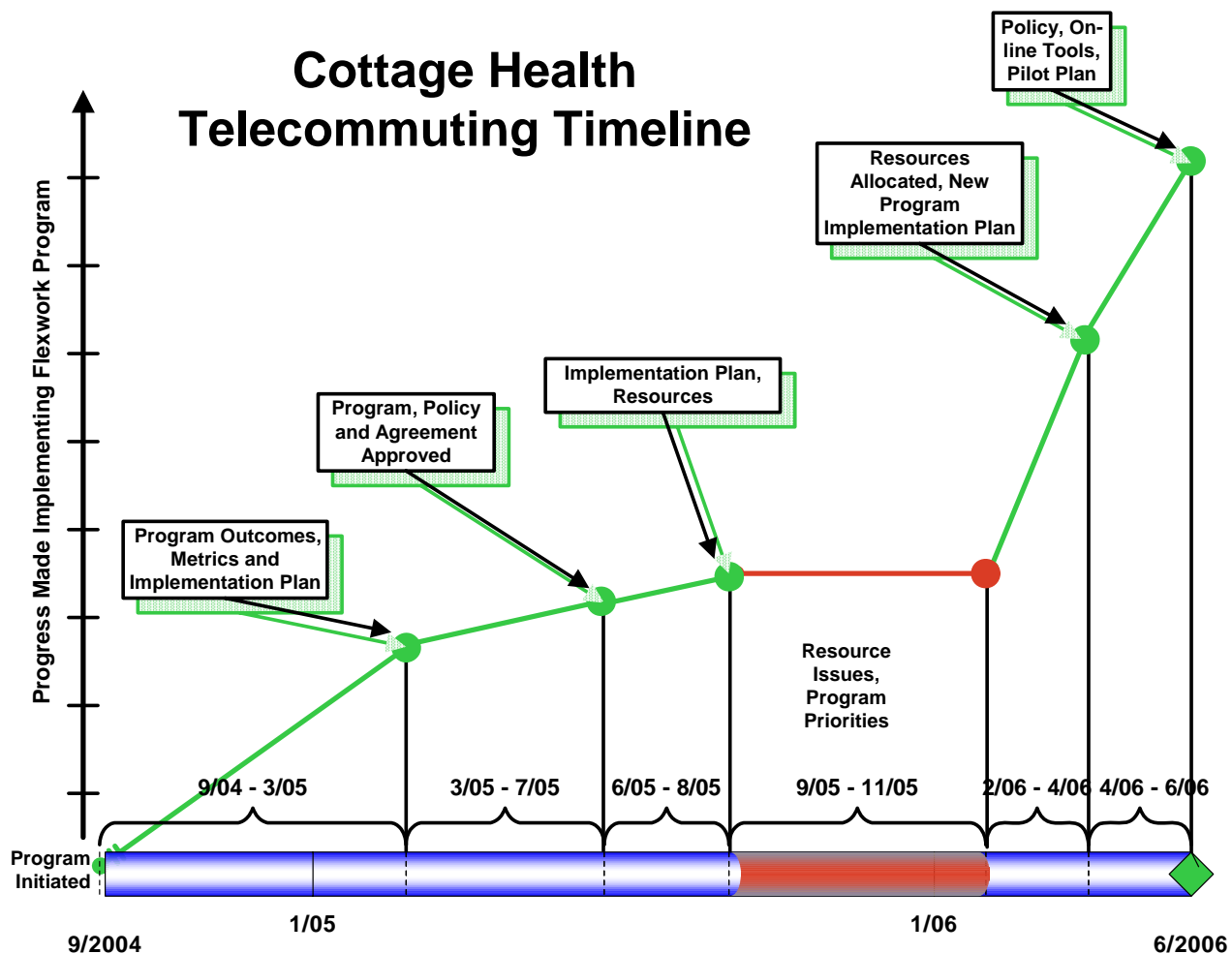
- ♦ On-line surveys
- ♦ Manager orientation workshops

### Key Statistics:

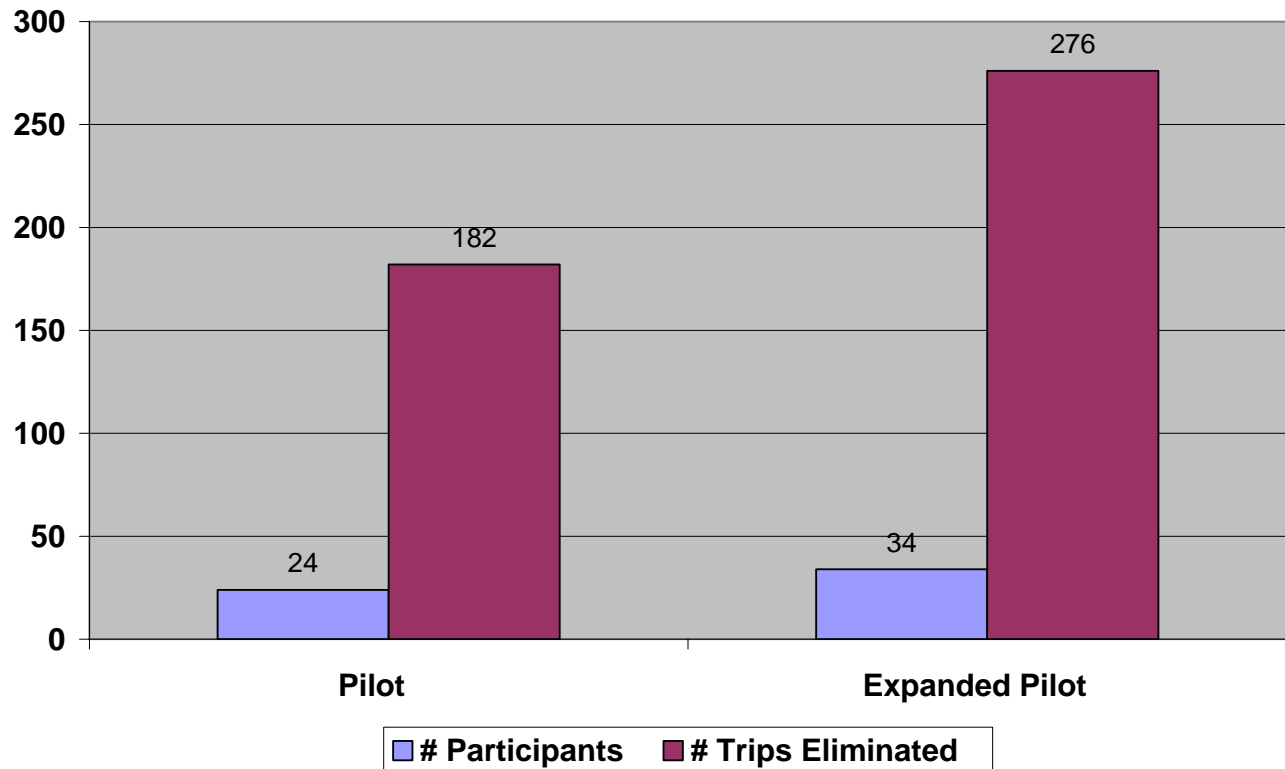
- ♦ 24 telecommuters are available to participate in the pilot. Several of these will be full-time telecommuters.
- ♦ Its estimated that ten (10) additional telecommuters will join after the initial pilot
- ♦ Transcriptionists will maintain productivity and quality metrics during the pilot.
- ♦ As the program matures additional groups of employee types will be available to join the telecommuting program. This will be partially dependent on the pilot and expansion of the program. As a result, the projected number of total telecommuters is unknown at this point.

### Next Steps:

- ♦ The pilot program will be launched in August 2006.
- ♦ The pilot will be extended to additional groups as the program matures.



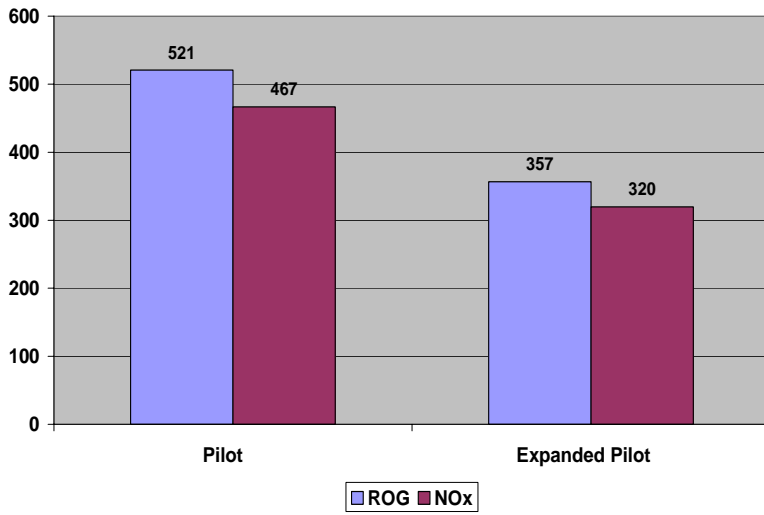
### Participation and Traffic Reduction, (Monthly)



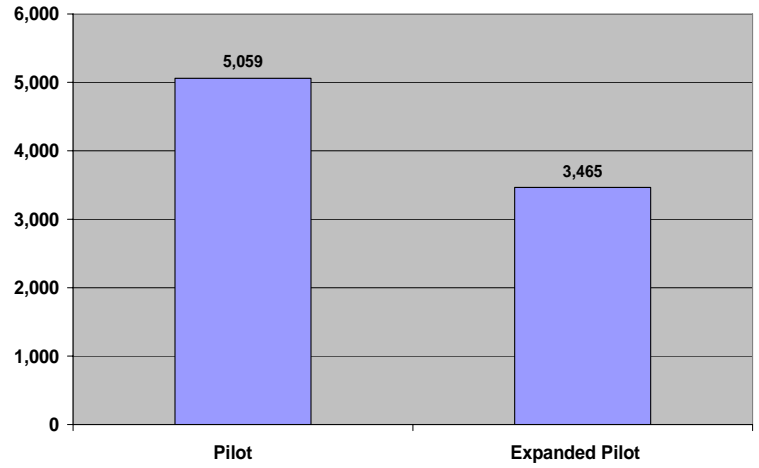
### Participation and Emission Reductions Data, (Monthly)

	Pilot	Expanded Pilot
ROG, (Pounds)	521	357
NOx, (Pounds)	467	320
CO, (Pounds)	5,059	3,465
Particulates, (Grams)	5,610	3,843
CO2, (Pounds)	130,251	89,220
# Participants	24	34
# Trips Eliminated	182	276

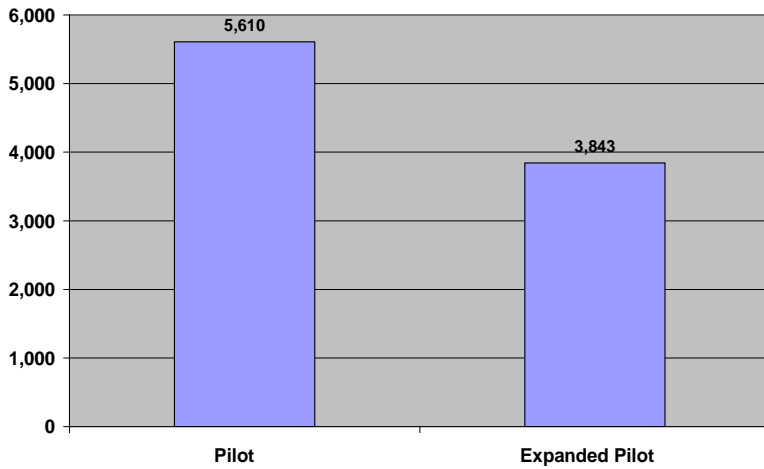
ROG, NOx Emission Reductions, (Pounds/Month)



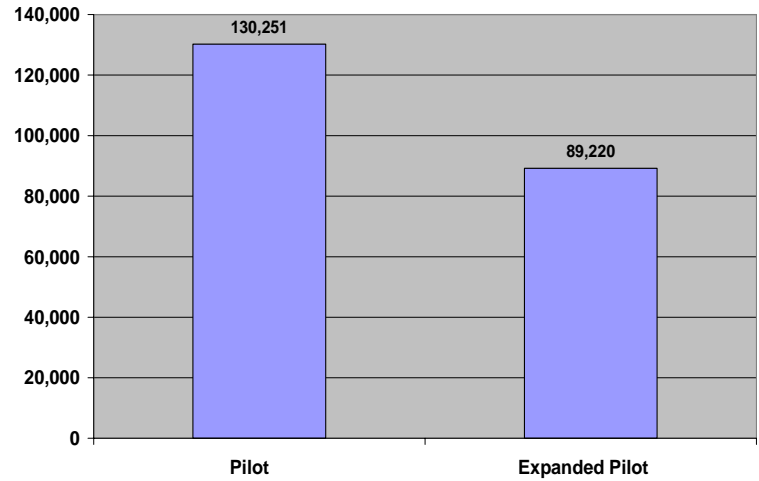
CO Emission Reductions, (Pounds/Month)



Particulate Emission Reductions, (Grams/Month)



CO2 Emission Reductions, (Pounds/Month)



# Santa Barbara County Sheriff's Department



*"I never thought we'd get to this point."  
[implementing a telework pilot]."* - Sonny LeGault

<b>Start Date:</b>	<b>10/12/2004</b>
<b>Type(s) of Flexwork:</b>	<b>Telework Compressed Workweeks Flexible Schedules</b>
<b>Program Goals:</b>	<b>Employee Retention Employee Recruiting Productivity Gains</b>
<b>Main Hurdle:</b>	<b>Negative perceptions remained from previous informal program</b>
<b>Biggest Surprise:</b>	<b>Support from supervisors and managers after orientation mtg.</b>
<b>First Meeting:</b>	<b>8/03/04</b>
<b>Launch Date:</b>	<b>2/21/2006 (Pilot program)</b>

## About the Santa Barbara County Sheriff's Department:

The jurisdiction of Santa Barbara County Sheriff's Department covers more than 2,744 square miles including 118 miles of coastline, the Channel Islands offshore and 983 square miles of National Forest. The Sheriff's Department is also responsible for several urban and rural communities, including the cities of Buellton, Solvang and Carpinteria, for which the Department provides police services under contract.

The public we protect numbers over 189,000, roughly half of the county population. In the Sheriff's Department at this time, there are nearly 300 Sworn Deputy Sheriffs, over 175 Sworn Corrections Officers and nearly 200 Civilian Employees.

Early in 2005 Sheriff Jim Anderson appointed Sonny LeGault as the lead in investigating the feasibility and outcomes for a formal flexwork program at the Sheriff's Department. The Sheriff's Department became the pilot organization for the overall County of Santa Barbara and the FlexWork Santa Barbara Phase I Program.



## Sheriff's Department Flexwork Program Goals:

The Sheriff's Department already incorporates several types of compressed workweeks in order to support the various parts of its organization. A telecommuting program was implemented in 1999 through the use of the County telecommuting policy. Utilization of the program was left up to individual supervisors and managers and there were no methods of tracking the types of programs being utilized or participation. The decision was made to implement a telecommuting pilot in a limited number of departments.

## Flexwork Pilot Goals:

- ♦ Demonstrating that a formalized, structured telecommuting program was feasible and would address the concerns of the supervisors and managers.
- ♦ Provide evidence that a formal telecommuting program would increase employee retention,
- ♦ Develop a process by which telecommuting could be used to augment employee recruitment.
- ♦ Provide metrics and measurements that establish that telecommuting increased employee productivity.

**Long-Term Flexwork Program Goals:**

- ♦ Expanding the formal program to include flexible schedules and obtaining more benefits from that program.
- ♦ Utilizing telework to provide office-space flexibility and reduced real-estate needs.

**Sheriff Department's Flexwork Pilot Outcomes:**

The Sheriff's Department launched their flexwork pilot in April of 2006. Four departments were involved in the pilot including the Training Bureau, Special Operations, Administrative Services and Systems and Technology.

- ♦ As of April 30th, 2006, there were eleven participants in the pilot program as telecommuters.
- ♦ A post pilot survey will be conducted at the end of July 2006.

**Significant Hurdles to Implementing:**

- ♦ Supervisor and management resistance, mainly based on experiences with the previous informal program.
- ♦ Systems and Technology is understaffed, the remote access request process is time intensive, and a part of the process is dependent on County IT for the completion of a request. A minimum of three weeks is needed to complete a remote access request. A new remote access system is scheduled to be launched July 1, 2006 which should alleviate this issue.

**Biggest Surprises:**

- ♦ The number of supervisors/managers opposed to telecommuting was the minority, but very vocal.
- ♦ Resistant supervisors/managers turned to supporters of the program after workshops were conducted.
- ♦ The on-line survey indicated that the average County Sheriff employee was commuting more than 35 miles each way, adding to commuting stress and greater turnover.

**Key FlexWork Policies and Tools:**

- ♦ The new policy incorporated all of the County program's guidelines with additional information developed for the Sheriff's flexwork program.
- ♦ The flexwork policy incorporated all types of flexwork and required formal signatures.
- ♦ An on-line survey was conducted throughout the department to identify the attitudes and concerns of all employees and supervisors/managers.
- ♦ Telecommuting can be discontinued at any time by employee and/or supervisor
- ♦ The Work Suitability Assessment tool was used by all eligible employees.

**Key Statistics:**

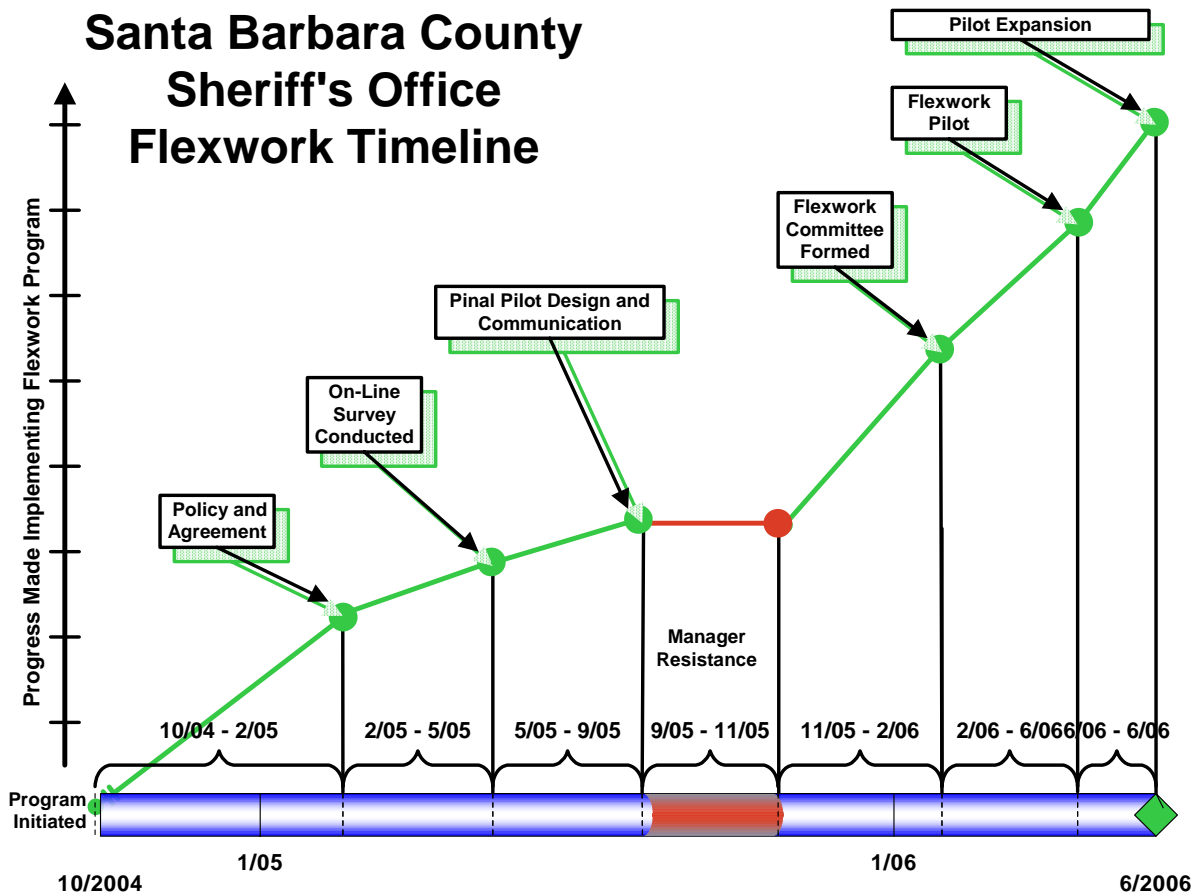
- ♦ There are ten SBSO employees participating in their flexwork pilot, all of them teleworking from one half of a day per week to one day per week.
- ♦ Productivity increases have been noted in analyzing cases, report writing, replying to emails and voicemail messages and performing computer-centric tasks.

**Next Steps:**

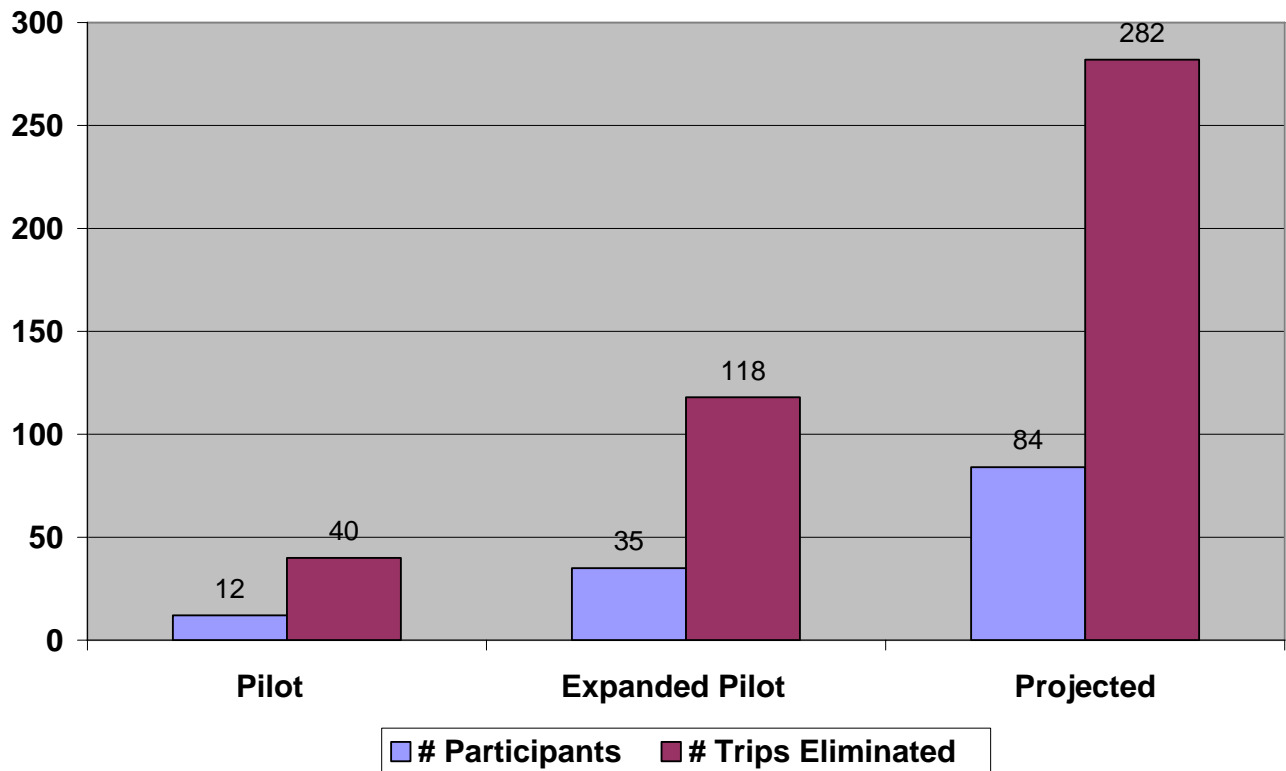
- ♦ August 1, 2006 the Patrol Bureau will be included in the telework pilot. This is a significant division with over 200 employees. Compressed workweeks will be included in the program and the tools and processes will be surveyed within this group.
- ♦ August 15, 2006, after the new Remote Access system has been implemented the flexwork program will be rolled out to the entire organization.



# Santa Barbara County Sheriff's Office Flexwork Timeline

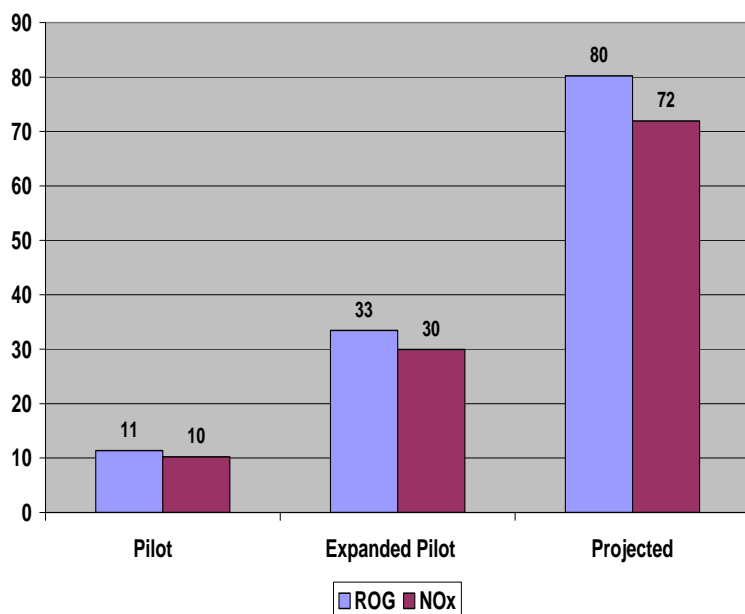


## Participation and Traffic Reduction, (Monthly)

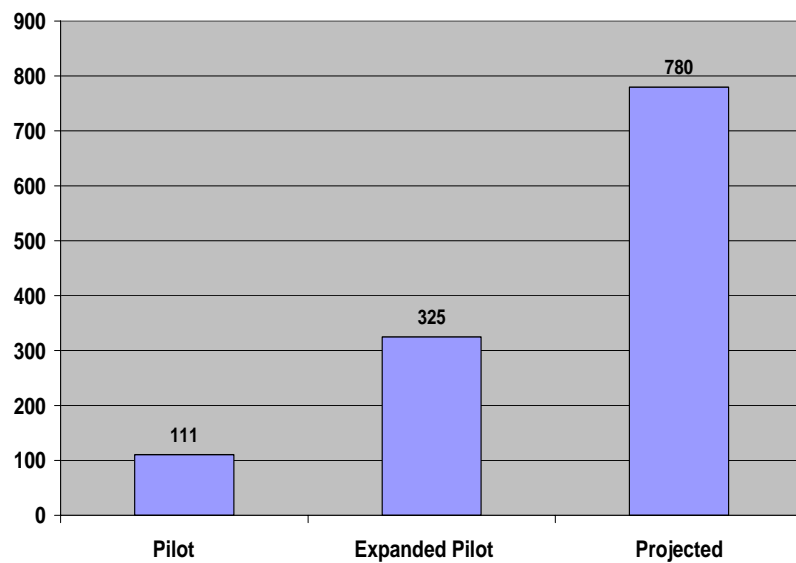


	Pilot	Expanded Pilot	Projected
ROG	11.4	33.4	80.2
NOx	10.2	30.0	71.9
CO	111	325	780
PM10	123	360	865
CO2	2847	8364	20073
# Participants	12	35	84
# Trips Eliminated	40	118	282

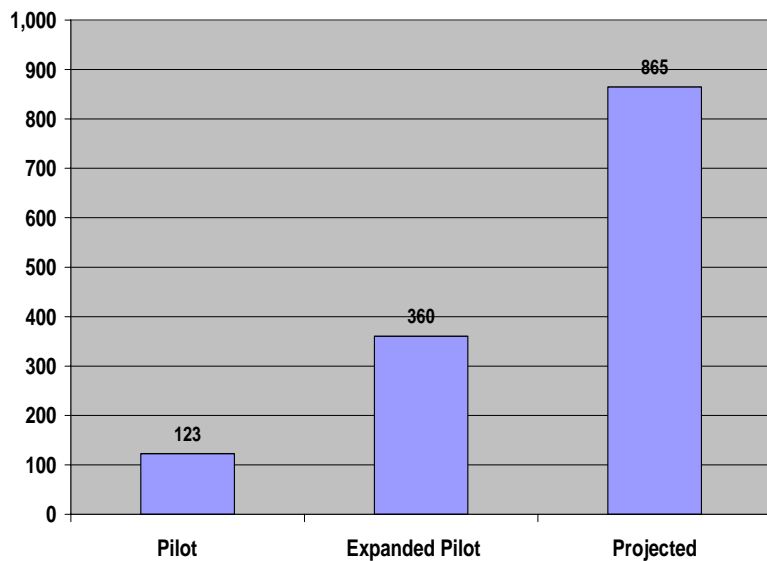
ROG, NOx Emission Reductions, (Pounds/Month)



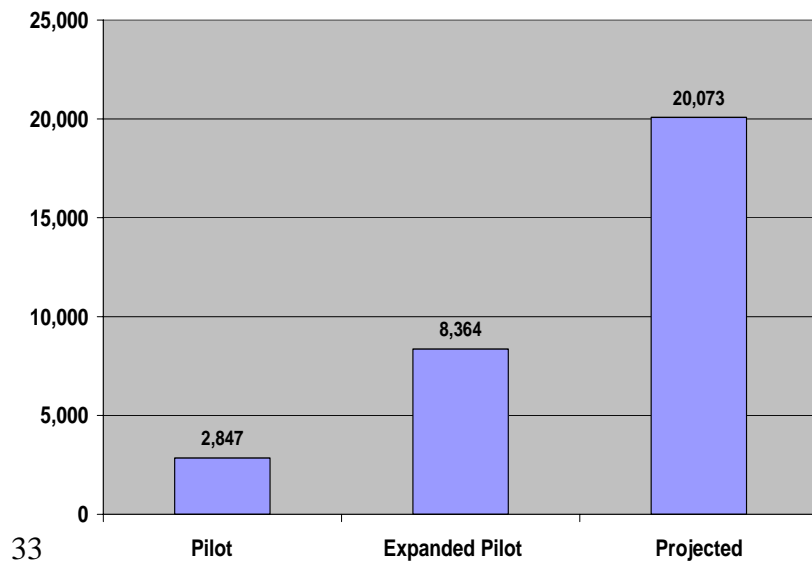
CO Emission Reductions (Pounds/Month)



Particulate Emission Reductions (Grams/Month)



CO2 Emission Reductions (Pounds/Month)



# Santa Barbara County Association of Governments



*"FlexWork is the only employee benefit that increases productivity and improves employee morale at no cost to our agency."*

<b>Start Date:</b>	<b>11/17/2004</b>
<b>Type(s) of Flexwork:</b>	<b>Telework Compressed Workweeks Flexible Schedules</b>
<b>Program Goals:</b>	<b>Employee Retention Employee Recruiting Employee Work/Life Balance Productivity Gains</b>
<b>Main Hurdle:</b>	<b>Developing a Program that Managers/Supervisors Actively Promote</b>
<b>Biggest Surprise:</b>	<b>Manager Post Pilot Involvement</b>
<b>Flexwork Pilot:</b>	<b>6/01/2005 – 11/30/2005</b>
<b>Program Rollout:</b>	<b>7/01/2006</b>

## About SBCAG and Traffic Solutions:

The Santa Barbara County Association of Governments, (SBCAG), is a regional planning agency comprised of Santa Barbara County and all eight incorporated cities within the county. SBCAG distributes local, state, and federal transportation funds and acts as a forum for addressing regional and multi-jurisdictional issues. SBCAG has responsibility for all regional transportation planning and programming activities. SBCAG staff is comprised of 20 employees.

Traffic Solutions is a division of SBCAG that promotes and encourages alternatives to driving alone, with the goals of reducing traffic congestion, air pollution and vehicle miles driven as well as improving the quality of life for employees, visitors, and residents of Santa Barbara County.

## SBCAG Flexwork Program Goals:

SBCAG has implemented a FlexWork Pilot program in order to promote better work/life balance of its employees, to benefit the Santa Barbara community through less congestion and air pollution, improve customer service, increase employee retention, employee recruitment, and increase productivity. The FlexWork Pilot program was also implemented so that SBCAG Traffic Solutions could gain direct experience with FlexWork programs and "practice what they preach." The SBCAG FlexWork Pilot was conducted for an 8 month period.

SBCAG began its involvement with Flexwork SB with no formal flexwork program in place, though most employees were allowed to utilize flexible schedules (management staff and administrative staff were not eligible for 9-80 schedules) and infrequent teleworking was allowed on a case-by-case basis through agreements with their managers. Both as the sponsors of the Flexwork Santa Barbara program, as well as to achieve more significant outcomes from the program, SBCAG decided to formalize their flexwork program and joined Flexwork Santa Barbara.

### **SBCAG's Flexwork Pilot Program:**

In August of 2005 an on-line survey was conducted for all SBCAG employees. The results of the survey showed:

- ♦ Over half of the employee not currently utilizing some type of flexwork wanted to.
- ♦ Approximately 1/3 of employees were interested in telecommuting on a regular basis.
- ♦ Over half of the employees felt that they would be more productive and comfortable working from home.
- ♦ The SBCAG Flexwork Pilot Program was started in November of 2005 and conducted through June 30, 2006.
- ♦ All employees including management and administrative staff were eligible to request a 9-80 compressed work schedule and/or telework 1 day a week subject to managers' approval.

### **SBCAG's Flexwork Pilot Outcomes:**

Staff's response to the Flexwork pilot program was very positive in terms of its affect on productivity, creativity, and employee morale. A post-pilot survey was conducted in July 2006 to gauge the success of the program and to solicit feedback from employees regarding areas of improvement. The following were some of the survey results:

- ♦ Five (5) of the 20 employees participated as part time telecommuters. Four (4) of these employees telecommuted occasionally on a case-by-case basis and one employee telecommuted regularly on a part time basis.
- ♦ Two (2) of the 20 employees participated as new compressed work week (9-80) employees. A total of twelve (12) employees work flexible schedules.
- ♦ 83% report that flexwork improves their job satisfaction.
- ♦ 66% report that flexwork reduces their stress levels at work.
- ♦ 91% of employees report that flexwork has no negative impacts on quality of their work or meeting deadlines.
- ♦ Most managers reported that the flexwork program has had a positive affect on productivity, meeting deadlines, creativity levels and work attitude. No negative affects were reported in these areas.
- ♦ 100% of the survey respondents indicated that they support the continuation of flexwork at SBCAG
- ♦ There were one to two employees that reported that flexwork has a slightly negative impact on communication with customers and coworkers and that flexwork has resulted in an increase in work load for those that do not flexwork.
- ♦ The survey reported some initial technical difficulties with getting remote access to their office computer, some concerns regarding team cohesiveness and concerns with scheduling overlapping flex days within a division.

### **Long-term goals for the flexwork program:**

SBCAG's short goal is to incorporate the FlexWork program into an overall Transportation Demand Management (TDM) program for SBCAG employees, including a bonus vacation benefit, transit pass subsidy and carpool gas card incentives. The long term goal is to increase the use of alternative transportation by 40% over the next three years and to increase the number of part time teleworkers from five employees to seven employees. Another long term goal will be to provide virtual personal network (VPN) access to all managers and long distance commuters in case of natural disasters, pandemics and family emergencies.

### **Significant Hurdles to Implementing:**

Initially there was some concern from management regarding the potential for low morale amongst employees that requested flexwork but were denied. There was also a concern that the managers

would not have the tools to objectively approve or deny flexwork requests. Once the program was launched there were hurdles for the employees wishing to flexwork. There were several time consuming steps to request and ultimately gain approval to telecommute. This likely resulted in fewer pilot participants. Some of the employees approved to telecommute initially experienced some technical difficulties gaining access to the VPN were initial hurdles. However these issues were resolved after purchasing a new laptop for telecommuters.

### **Biggest Surprises:**

There were fewer employees that requested telecommuting than had originally shown an interest. This was due, in part to some employees' concern that telecommuting might interfere with their personal life. It was thought that many of the long distance commuters would wish to telecommute, however, most of the individuals that were approved to telecommute were motivated by a desire to increase work productivity rather than to avoid their commute.

### **Key FlexWork Policies and Tools:**

The tools developed for this program included an SBCAG Flexwork web site, written guidelines, and an agreement form. The web site provides access to policies, assessments, guidelines, and information and had components specifically for the department manager or the flexworker. The policy contains information around obtaining and maintaining equipment and supplies, data security, usage of equipment, off-site office safety, and ergonomic guidelines. The agreement includes employee information, and details on their specific flexwork program (e.g. dates, location, etc., duties to be performed while flexworking, system access and technical support, types of hardware, software, supplies and other items needed for the flexwork arrangement).

- ♦ Written guidelines and an agreement form.
- ♦ On-line Work Suitability Assessment (WSA).
- ♦ On-line Employee Suitability Assessment (ESA).
- ♦ On-line surveys
- ♦ Employee Orientation Workshop

### **Key Statistics:**

Five telecommuters and two new 9-80 schedule employees in Pilot

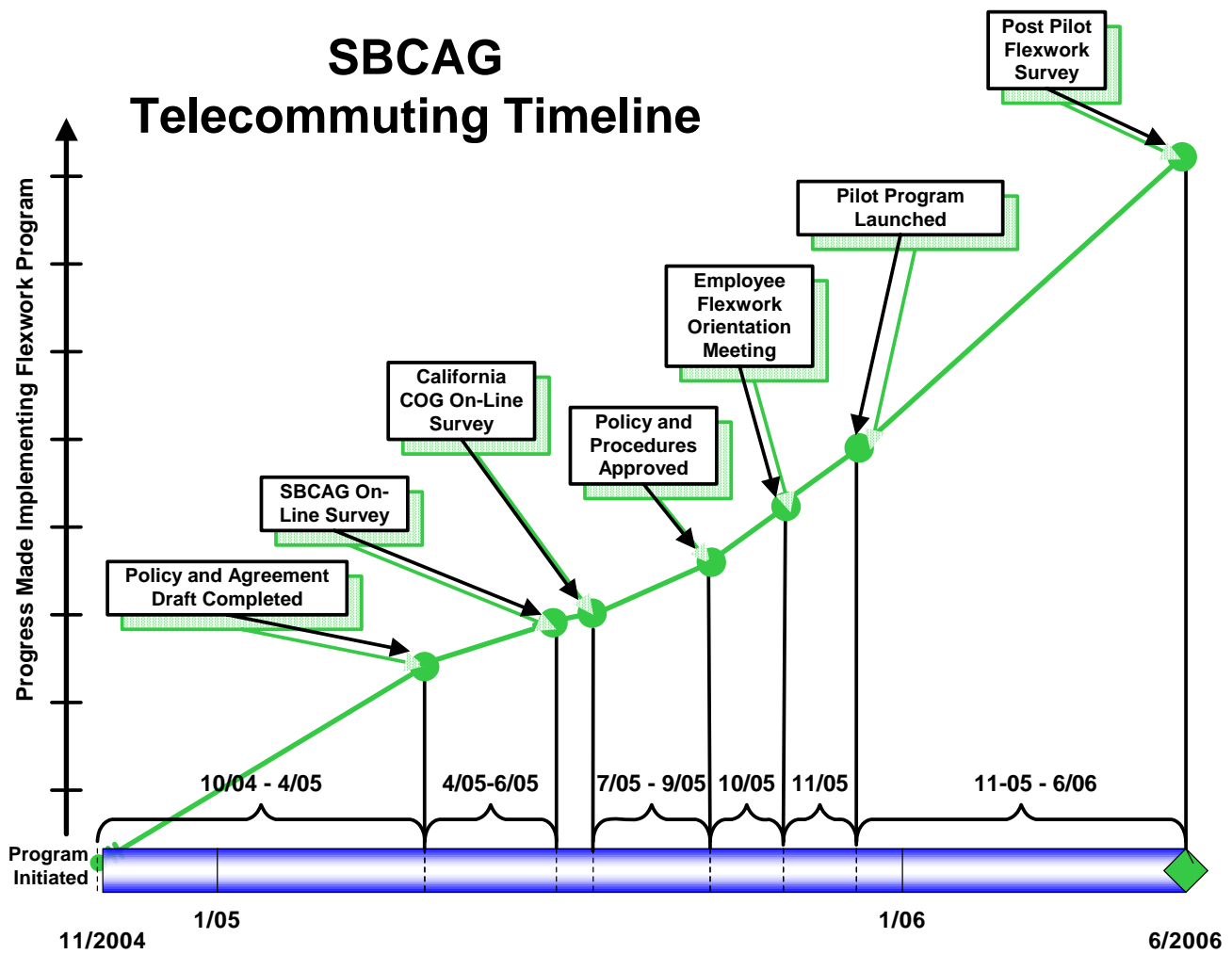
Five telecommuters and twelve 9-80 schedule employees as of June 31st, 2006

### **Next Steps**

SBCAG management is compiling feedback from employees to determine if any modifications need to be made to the final SBCAG FlexWork Policies and Procedures. An effort will also be made to give more employees remote access to their office computers.

<b>Participation and Emission Reductions, (Monthly)</b>	<b>Expanded Pilot</b>
<b># Participants</b>	<b>13</b>
<b># Trips Eliminated</b>	<b>32</b>
<b># Peak Period Trips Eliminated</b>	<b>78</b>
<b>ROG (Pounds)</b>	<b>3</b>
<b>NOx (Pounds)</b>	<b>3</b>
<b>CO (Pounds)</b>	<b>32</b>
<b>PM10 (Grams)</b>	<b>36</b>
<b>CO2 (Pounds)</b>	<b>833</b>

# SBCAG Telecommuting Timeline



# Veeco



"Keeping a high level of employee satisfaction leads to retention and considerable cost saving for the company."

<b>Start Date:</b>	<b>8/11/2004</b>
<b>Type(s) of Flexwork:</b>	<b>Telecommuting</b>
<b>Program Goals:</b>	<b>Employee Retention Employee Recruiting Employee Work/Life Balance Productivity Gains</b>
<b>Main Hurdle:</b>	<b>Internal Organizational Changes and HR Turnover</b>
<b>Biggest Surprise:</b>	<b>Acceptance of Telework by New HR Management</b>
<b>Program Rollout:</b>	<b>TBD</b>

## About Veeco:

Veeco provides metrology and process equipment systems for industry leaders in the semiconductor, data storage, telecom/wireless and scientific/research markets. Veeco has offices in the U.S., France, Germany, the Netherlands, China, Japan, England, Korea, Malaysia, Singapore, Taiwan and Thailand. Veeco's metrology divisions are located at two sites in Santa Barbara.

## Veeco's Flexwork Program Goals:

Veeco was in the process of implementing a flexible schedule arrangement when they joined the FlexworkSB program. The focus of their involvement has been to add telework to their alternative work arrangement offerings. One of Veeco's goals for the telework program is to increase employee satisfaction and reduce employee turnover. The second goal is to develop metrics that will gauge increases in productivity and reduced overhead costs in selected job types.

Veeco has an existing flexible schedule program. Telework will be conducted as a standalone project. After the program has been piloted and rolled out to the entire Santa Barbara Division it will be investigated whether or not to combine the programs, policies and tools.

## Veeco's Timeline:

Scott Missman, Veeco's IT Infrastructure Manager, attended the August 11<sup>th</sup>, 2004 Flexwork Fundamentals Workshop. Veeco's Santa Barbara General Manager promoted Veeco's participation in the FlexworkSB program and asked Scott to lead their effort.

On December 15<sup>th</sup>, 2004 the Director of Operations is provided with Veeco's plans to join the Flexwork SB program and an outline of the services and products that TAG will provide. How these efforts will mesh with an ongoing alternative work arrangement is also determined. The telework program will be developed independently during the pilot program and integrated into the overall program at a later date.

In February of 2005 the policy and program were approved by the Director of Operations. An on-line manager survey was developed and a Manager Workshop was customized for Veeco.



In March of 2005 the Director of Human Resources for Veeco in Santa Barbara is let go by the company. The program is delayed until a new Director for HR is hired but the decision is made to proceed with the on-line managers' survey.

In April of 2005 the Corporate VP for Veeco International quits. Without a regional HR director the program is again delayed and the on-line survey is canceled for the time being.

In June of 2005 a new Director is hired in Santa Barbara the director of operations. The program is on hold until the new Director can review the telework program and progress to this point.

In July of 2005 a new Director of HR is hired. The new Director is supportive of flexwork and telework and determines to reinstate the programs as soon as feasible. The new Director lives in New York making communication and progress more difficult.

In October of 2005 the Director of Operations is let go by Veeco. As the driving force behind telework within Veeco the program is again placed on hold until the new Director has a chance to review the program.

In January of 2006 the HR staff reviews the new release of TAG's Work and Employee Suitability assessments. The feedback is positive and the program is approved to move forward.

In March of 2006 the lead HR generalist who was leading the program from HR's side leaves. As a result, we are spending time re-orientating new people as to what has been accomplished and our status. HR is also understaffed. At this point we consider the program to be on "hold" until the situation at Veeco stabilizes.

In July of 2006 the last remaining HR generalist who was present at the beginning of Veeco's flexwork program quits.

Veeco's flexwork program is still an "active" project within Veeco. However, until the HR department is staffed and stabilized it has been determined to minimize the amount of resources committed by the Flexwork Santa Barbara program.



# Superconductor Technologies



**"Due to difficulty in finding the right candidates... being able to offer telecommuting is a big advantage." – SuperTech Manager**

<b>Start Date:</b>	<b>8/20/2004</b>
<b>Type(s) of Flexwork:</b>	<b>Telecommuting</b>
<b>Program Goals:</b>	<b>Employee Retention Employee Recruiting Employee Work/Life Balance Productivity Gains</b>
<b>Main Hurdle:</b>	<b>Employee Layoffs and management turnover</b>
<b>Biggest Surprise:</b>	<b>n/a</b>
<b>Flexwork Pilot:</b>	<b>n/a</b>
<b>Program Rollout:</b>	<b>n/a</b>

## About Superconductor Technologies

Superconductor Technologies Inc., (STI), headquartered in Santa Barbara, CA, is the global leader in developing, manufacturing, and marketing superconducting products for wireless networks. With 154 employees from engineering, design and manufacturing to sales and service STI is constantly striving to provide its employees with a broad array of solutions to the everyday issues they face, including the peak traffic congestion that many face.

## Superconductor Technologies Flexwork Program Goals

Superconductor began working with the Flexwork Santa Barbara Phase One Program with a telework policy already in place. However, they quickly identified that including additional flexwork options would provide more benefits for the employees and would also require a more formal set of policies and agreements.

As STI is in a very dynamic business environment they are constantly focused on employee satisfaction and the ability to recruit new employees as business conditions dictate. This is the primary outcome for the flexwork program. Utilizing a compressed workweek structure in the manufacturing component of STI's business is being investigated as a way to obtain significant overhead savings.



## Superconductor Technology's Timeline:

Superconductor Technology's policy was updated to include compressed workweeks and flexible schedules. The telework component of the policy was also expanded and updated. The new policy was signed off by senior management in November of 2004. In December of 2004 an on-line survey was conducted to gauge the experience and attitudes of the employees at Supertech. Below are some of the results of the survey which resulted in the approval by upper management to proceed with the program.

The average commute of the respondents to the survey was over 35 miles each way with almost one-third of the employees commuting over 55 miles each way.

Managers were asked if they would support each type of flexwork in their own workgroups. While flexible schedules and compressed workweeks were supported by a majority of managers, (80% and 90% respectively), telework was supported by only 50 percent of the manager's. As this survey was conducted before any elements of the program were introduced, (which typically increases management support for the program), senior management agreed that 50 percent was acceptable to include telework in the flexwork program.

	<b>Unlikely To Support</b>	<b>Somewhat Likely To Support</b>	<b>Very Likely to Support</b>
<b>Telework (telecommuting)</b>	<b>50%</b>	10%	40%
<b>Flexible work schedules</b>	20%	0%	<b>80%</b>
<b>Compressed workweeks</b>	10%	30%	<b>60%</b>
<b>A combination of telework and flexible work schedules</b>	30%	30%	<b>40%</b>

When asked what benefits from a flexwork program were achievable respondents overwhelming supported all of them with the exception of real-estate savings, (70% responded not possible). This was largely due to the fact that Supertech has manufacturing on-site and many of the operations support it. As a result, having employees share offices or go to a hoteling scenario were not seen as very compelling.

	<b>Not Possible</b>	<b>Maybe</b>	<b>Very Possible</b>
<b>Increased employee retention</b>	0%	<b>70%</b>	<b>30%</b>
<b>Improved employee attraction (use as a recruiting tool)</b>	0%	<b>40%</b>	<b>60%</b>
<b>Higher job satisfaction</b>	0%	<b>50%</b>	<b>50%</b>
<b>Productivity gains</b>	30%	<b>50%</b>	<b>20%</b>
<b>Overhead cost reductions</b>	30%	<b>60%</b>	<b>10%</b>
<b>Real-estate savings</b>	<b>70%</b>	20%	10%

When asked if they would personally flexwork, 60 percent of the respondents indicated that they would. Twenty percent were not sure and twenty percent indicated that they would not. In a typical organization, 20 to 30 percent of the employees prefer to work at the job-site during standard working hours.

The Flexwork program was put on "hold" for six weeks at the beginning of January due to more urgent requirements for HR to focus on, primarily hiring new employees.

In March of 2006 a report and proposal were prepared for senior management. Karen Salcido, the VP of Human Resources was promoted to the senior management team prior to the presentation. The CEO stated he was supportive of the program, primarily as a way to send a "positive message" to employees that Superconductor Technologies was vested in their work/life balance and work satisfaction.

In April the CEO of Superconductor Technologies was let go and it was announced that the company would be laying off employees. The incoming CEO felt that there were more immediate concerns for departments to focus on. He did not think it was a good time to implement the flexwork program and put it on hold indefinitely.

# Goleta Water District



<b>Start Date:</b>	<b>8/04/2004</b>
<b>Type(s) of Flexwork:</b>	<b>Telework</b>
<b>Program Goals:</b>	<b>Compressed Workweeks</b>
	<b>Employee Retention</b>
	<b>Employee Recruiting</b>
	<b>Employee Work/Life Balance</b>
<b>Main Hurdle:</b>	<b>Acceptance by Supervisors</b>
<b>Biggest Surprise:</b>	<b>n/a</b>
<b>Program Rollout:</b>	<b>n/a</b>

## About the Goleta Water District:

The District's mission is to provide an adequate supply of quality water at the most reasonable cost to the present and future customers within the Goleta Water District.

Established on November 17, 1944, the Goleta Water District encompasses an area extending along the south coast of Santa Barbara County west from the Santa Barbara city limits to El Capitan. The District, which spans approximately 29,000 acres, is bound on the south by the ocean and on the north by the foothills of the Santa Ynez mountains. GWD uses 230 miles of pipeline to provide water to approximately 75,000 people.

The District operates under the general direction of an elected five-member Board of Directors. The terms of office are four years, and elections for two or three directors are held every two years. The Board meets on the second Tuesday of each month, and these meetings are open to the public.

The Board employs a General Manager/Chief Engineer to manage approximately 60 people who carry out a variety of District functions. These include meter installation and repair, water quality testing, infrastructure development and maintenance, and customer support.



The Board also determines water rates. GWD rates have consistently remained among the lowest on the South Coast for both urban and agricultural customers.

## Goleta Water District's Flexwork Program Goals:

The director of the Goleta Water District initiated its involvement in the program. His plans for a flexwork program were to provide relief for employees from the commutes many were facing, and thus positively impact employee satisfaction and retention. Flexwork could also be used in recruiting materials. The ability to increase productivity, and possibly increase customer service hours without increasing costs were also under consideration.

**Goleta Water District's Timeline:**

In October of 2004 Goleta joined the Flexwork Santa Barbara Phase I program. The setup of the organization and job-types were researched to identify which could most easily be included in a pilot program.

In January a draft policy and a draft agreement were completed and approved by the director.

In February job-types and job-tasks were identified to conduct a pilot that would include both compressed workweeks and telecommuting. The telecommuting jobs included metrics to prove the maintenance or improvement of productivity and the compressed workweeks were designed to expand customer service hours without increasing costs. An on-line survey was designed to assess the impact on flexworkers, their non-flexworking co-workers and managers.

In March the program was presented to the top managers of each of Goleta's four departments. The goal of the meeting was to identify at least one department willing to conduct a pilot. None of the departments could come up with a consensus to conduct a pilot and the pilot plan was canceled.

## Appendix B:

# Sample Documents and Tools

# Sample Flexwork Policy

## SANTA BARBARA COUNTY SHERIFF'S DEPARTMENT FLEXWORK POLICY

SBSO has implemented a SBSO FlexWork Pilot program in order to promote better work/life balance of its employees, to benefit the Santa Barbara community through less congestion and air pollution, improve our service to the citizens of the County, increase employee retention, employee recruitment, and increase productivity. The SBSO FlexWork Pilot will be conducted for a three month period.

SBSO's flexwork program includes telecommuting as well as the existing compressed workweek and flexible-schedule programs. The employee and supervisor/manager must complete all assessments, agreements, and obtain signatures before an employee may begin a flexwork arrangement. By signing this agreement, the employee certifies that they have reviewed, understand and agree to abide by the provisions of SBSO's policies and procedures as well as the attached Employee FlexWork Agreement Form.

- Telecommuting is defined as working at a location other than the county provided work space.
- Compressed workweeks include schedules such as a 4/10 or a 9/80.
- Flexible schedules allow employees to begin their regular workday earlier or later than what is standard for their workday or shift.

### **Employment Status**

This program is voluntary. It may be initiated upon formal written request by the employee and must be approved by the employee's supervisor/manager. Participation in a flexwork program may be terminated by the employee or supervisor/manager with written notice or at the discretion of the supervisor/manager. Every effort will be made to come to a mutually agreed upon time period to terminate the program with the final decision being the responsibility of the supervisor/manager.

The employee remains obligated to comply with all SBSO rules, policies, practices and instructions that would apply if the employee were working at the regular worksite. Failure to comply may result in the termination of the employee's participation in the flexwork program. These guidelines include the following:

- 1) Flexwork is a management option, not an employee benefit or entitlement.
- 2) The employee remains obligated to comply with all SBSO rules, policies, practices and instructions that would apply if the employee were working at the regular worksite.
- 3) Work products developed or produced by the employee while flexworking are the property of the SBSO.
- 4) Benefits, salaries, compensation, and leave scheduling will not be changed as a result of participating in a flexwork schedule and will continue to be governed by applicable SBSO policies.
- 5) The employee's supervisor/manager has the right to modify the flexwork agreement based on

need due to holidays, vacations, or other special circumstances.

- 6) Requests to work overtime or use leave time must be approved, in writing, in advance by the employee's supervisor/manager.
- 7) The employee's flexworking hours will conform to a schedule agreed upon by the employee and their supervisor/manager. The schedule and methods for communication between the flexworker and supervisor/manager will be mutually agreed upon and included in the flexwork agreement.
- 8) If sick or unable to work due to personal needs while flexworking, the flexworker will contact their supervisor/manager and will take leave or arrange alternate work hours for hours not worked.

### **Employee Flexwork Participation Criteria**

- 1) The employee's continued participation in the flexwork schedule is contingent upon acceptable performance standards as determined by the supervisor/manager.
- 2) Failure to comply with any employee flexwork policies, participation criteria, SBSO rules or practices may result in the termination of the employee's participation in the flexwork program
- 3) Flexworking is not a substitute for any home-care arrangements (childcare, eldercare, etc.). The employee must arrange with a supervisor/manager to take approved leave of absence under SBSO leave of absence policies if the employee must act as a primary caregiver on scheduled work time.
- 4) All flexworkers must have the support of their supervisors/managers.
- 5) An employee must have completed the Work Suitability Assessment, the Flexwork Agreement, the Employee Suitability Assessment (for telecommuting programs only), and have submitted and received approval of his/her flexwork agreement form from the supervisor/manager and their department head.
- 6) The feasibility of providing proper equipment and supplies necessary to the job assignment at a reasonable cost must be demonstrated.
- 7) Various job classes, represented and non-represented, may participate in the program.

### **Program Continuation and Renewal**

- 1) A supervisor/manager will perform a periodic review of a flexworking employee's performance. If the supervisor/manager deems that the program has adversely affected the employee's work performance or the program's operations, the supervisor/manager may discontinue the employee's participation in the flexwork program.
- 2) The flexworker's participation may also be revoked by SBSO due to new or modified job-tasks, work-load needs or other SBSO business requirements.
- 3) If the employee wishes to renew this agreement, he/she will formally request renewal in writing. Renewal of the agreement is subject to review and approval by his/her supervisor/manager.

PLEASE NOTE: The remainder of the Flexwork Policy needs only to be read and agreed upon by employees requesting a telecommuting program, (e.g. working from home or a remote site). Employees seeking non-telecommuting types of flexwork may skip to the Flexwork Agreement.

# Sample Flexwork Agreement

## SHERIFF EMPLOYEE FLEXWORK AGREEMENT FORM

<b>EMPLOYEE NAME</b> (Last, First, M.I.)		<b>EMAIL ADDRESS</b>	<b>FLEXWORK START DATE</b>	<b>FLEXWORK END DATE</b> or <input type="checkbox"/> Indefinite
<b>DEPARTMENT</b>		<b>DIVISION</b>	<b>EMPLOYEE ID/BODY #</b>	<b>POSITION/TITLE</b>
<b>TYPE OF FLEXWORK:</b> <b>Compressed Workweek</b> <b>Flexible Schedule</b> <b>Telecommuting</b>	Work-Schedule _____ Day Off: <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun Start time _____ Finish time _____ Flex-Day(s): <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun Telecommuting Day(s): <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun			
<b>FLEXWORK SITE:</b>	Address:			
	City : _____ State: _____ Zip:: _____			
<b>YOUR REASONS FOR FLEXWORKING</b>				
<b>DUTIES &amp; ASSIGNMENTS TO BE PERFORMED WHILE FLEXWORKING:</b>				
<b>METHODS FOR EVALUATING PERFORMANCE:</b>				



<b>SYSTEMS ACCESSED FROM REMOTE LOCATION</b> <i>(pcAnywhere method requires a minimum of one week S&amp;T/ITS configuration)</i>	<input type="checkbox"/> Email portal (Access method and user credentials are not to be shared. Please direct new requestors to their supervisors or S&T. No annual fee.) <p style="text-align: center;">- OR -</p> <input type="checkbox"/> Direct access to my department PC <u>using pcAnywhere</u> (annual fee of \$120) Please Describe: _____ <b>Onsite PC PSID#:</b> _____
<b>OPERATING SYSTEM AT REMOTE LOCATION</b>	<input type="checkbox"/> Windows 2000 <input type="checkbox"/> Windows XP <span style="float: right;"><input type="checkbox"/> Other: _____</span>
<b>OFFICE SUITE AT REMOTE LOCATION</b>	<input type="checkbox"/> Office XP <input type="checkbox"/> Office 2003 <input type="checkbox"/> Other: _____
<b>COMPUTER SECURITY</b>	Anti Virus SW _____ Firewall Hardware/Software _____
<b>METHODS OF COMMUNICATION, TELECOMMUTING MEETINGS:</b> <i>(When telecommuting, the employee will be reachable through these methods)</i>	Phone: _____ <i>Is this a cell phone?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No Email address: _____ Pager: _____
<b>Is a weekly meeting required for participation?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	Day: _____ Time: _____ <Make a Selection> With: _____

<b>EQUIPMENT &amp; SUPPLIES:</b> <i>(Please note who will supply and specific types)</i>	Type	SBSO Supplied	Employee Supplied	Not Needed
	Computer; (specifiy laptop or desktop)	_____	_____	_____
	VPN/PCAnywhere (\$120/year minimum)	_____	_____	_____
	Software: <i>List Software</i>	_____	_____	_____
	Printer	_____	_____	_____

# Sample On-Line Survey Questions

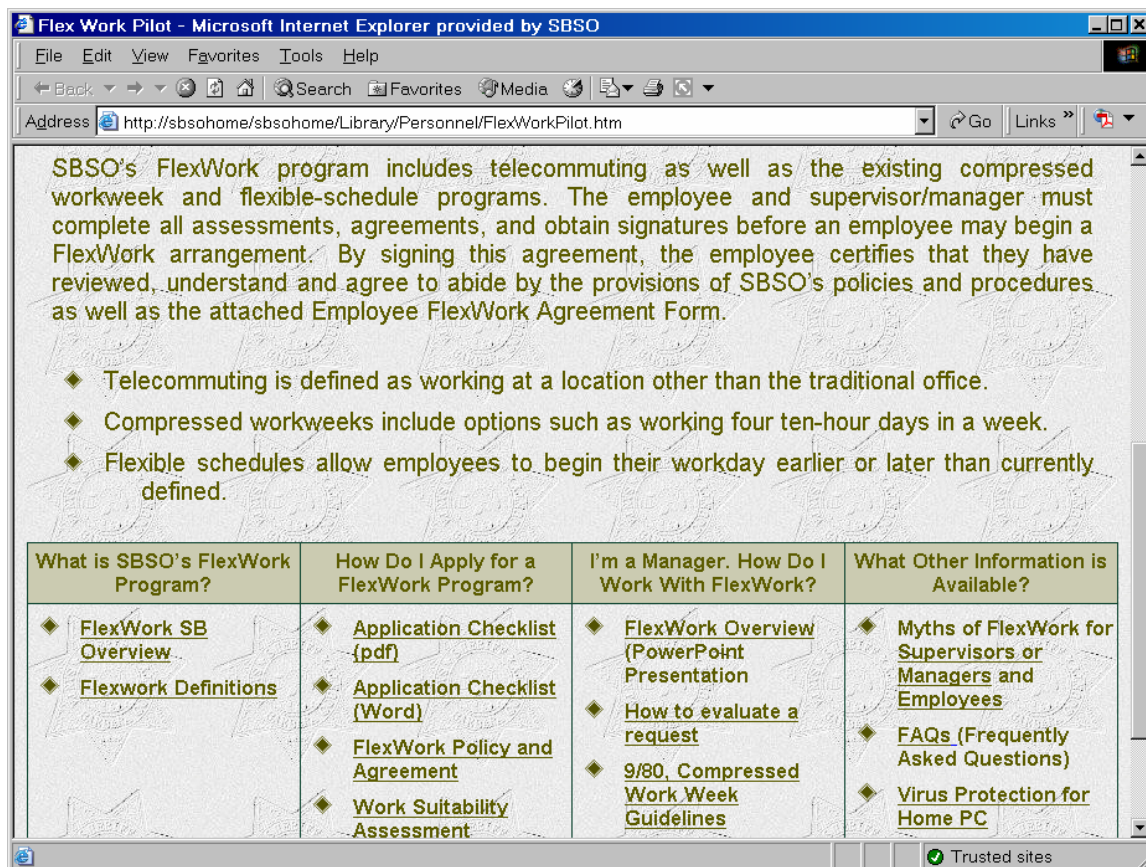
**3. In your opinion, could telework help your workgroup achieve each of the following benefits?**

	No	Possibly	Yes
Increased employee retention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increased employee morale and decreased stress levels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Higher job satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improved customer service levels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Decrease in unplanned absences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Productivity gains	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Decreased time at work used to do personal tasks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overhead cost reductions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Real-estate/Office space savings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Continuity of operations during natural disasters or other emergencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improved employee recruitment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**4. In your opinion, would your workgroup experience any of the following issues when participating in a telework program?**

	No	Possibly	Yes
Loss of productivity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equity issues for those who can't participate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Loss of interpersonal contact and workgroup cohesion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The costs to support the program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty scheduling meetings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Too many employees will want to participate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Negative impact on non-teleworkers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Negative impact on service to clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of upper management support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty tracking employee schedules	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of employee accountability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

# Sample Flexwork Website Screenshots



Flex Work Pilot - Microsoft Internet Explorer provided by SBSO

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Address <http://sbsohome/sbsohome/Library/Personnel/FlexWorkPilot.htm> Go Links

- ◆ Telecommuting is defined as working at a location other than the traditional office.
- ◆ Compressed workweeks include options such as working four ten-hour days in a week.
- ◆ Flexible schedules allow employees to begin their workday earlier or later than currently defined.

What is SBSO's FlexWork Program?	How Do I Apply for a FlexWork Program?	I'm a Manager. How Do I Work With FlexWork?	What Other Information is Available?
<ul style="list-style-type: none"> <li>◆ <a href="#">FlexWork SB Overview</a></li> <li>◆ <a href="#">Flexwork Definitions</a></li> </ul>	<ul style="list-style-type: none"> <li>◆ <a href="#">Application Checklist (pdf)</a></li> <li>◆ <a href="#">Application Checklist (Word)</a></li> <li>◆ <a href="#">FlexWork Policy and Agreement</a></li> <li>◆ <a href="#">Work Suitability Assessment</a></li> <li>◆ <a href="#">Employee Suitability Assessment</a></li> </ul>	<ul style="list-style-type: none"> <li>◆ <a href="#">FlexWork Overview (PowerPoint Presentation)</a></li> <li>◆ <a href="#">How to evaluate a request</a></li> <li>◆ <a href="#">9/80, Compressed Work Week Guidelines</a></li> </ul>	<ul style="list-style-type: none"> <li>◆ <a href="#">Myths of FlexWork for Supervisors or Managers and Employees</a></li> <li>◆ <a href="#">FAQs (Frequently Asked Questions)</a></li> <li>◆ <a href="#">Virus Protection for Home PC</a></li> <li>◆ <a href="#">Employee Purchase of MS Office for FlexWork Use</a></li> </ul>

This website is maintained by the Sheriff's Systems & Technology Bureau. Information is provided by Sheriff's Administration and Custody Operations. The site was last updated on 02/28/2006.

Trusted sites



# Sample Employee Flexwork Checklist



## Telecommuting Application Checklist

- ✓ - Your checklist to follow through the application process

✓	TASK	NOTES
	Read the Cottage Health Telecommuting overview located on the Cottage Health telecommuting website.	
	Access and read Cottage Health's Policy and Agreement located on the Cottage Health telecommuting website.	
	Complete the Work Suitability Assessment including:	
	<ul style="list-style-type: none"> <li>Identify your job-tasks that are most suitable to telecommuting.</li> <li>Identify your job-tasks that must be completed in the office.</li> <li>Identify job metrics that will demonstrate your performance while telecommuting.</li> <li>Utilize the job-task, metric and scheduling worksheets to collaboratively design your telecommuting program with your manager/director.</li> </ul>	
	Read the on-line ergonomics guidelines.	
	Read the on-line home office setup and safety guidelines.	
	Schedule a meeting with your manager to discuss your telecommuting proposal. This discussion may include modifications to your proposal to address any concerns of your manager.	
	If your proposal is approved and you agree with any modifications, finalize and sign the Telecommuting Agreement and obtain the following signatures:	
	• Manager/Director	
	• Human Resources	
	• ISD	
	• Vice President	
	Ensure that copies of your agreement have been sent to HR and your department personnel file.	
	Complete and test your remote email or system access.	
	Begin Flexworking!	

# Work Suitability Assessment Data Entry



## Work Suitability Assessment™

### Instructions

Below you are asked to rate different types of tasks you perform for your job, based on how much time you spend on them in the office, and how much time you foresee spending on them remotely. The rating scale is as follows:

0	1	2	3	4	5
Do not perform	Very low amount of time	Low amount of time	Moderate amount of time	High amount of time	Very high amount of time

Once you have completed the assessment, click Submit and print out your results pages to provide to your manager or supervisor along with your flexwork application. Your results will not be saved online for future access.

Name:

Date:

Job Title:

Department:

Supervisor/Manager:

Perform work that requires access to special equipment or materials at the office (including high-security, sensitive materials).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	0	1	2	3	4	5
Perform tasks that are "portable" (i.e., can be completed independently and remotely).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	0	1	2	3	4	5
Have a dedicated and suitable remote work location.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	0	1	2	3	4	5
Perform work that is quantifiable (i.e., defined outputs/results, and/or clear objectives and start/end dates.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	0	1	2	3	4	5

# Work Suitability Assessment Results Sample



## Work Suitability Assessment™

Name: John Johnson

Date: Jan. 11, 2006

Job Title: Engineer

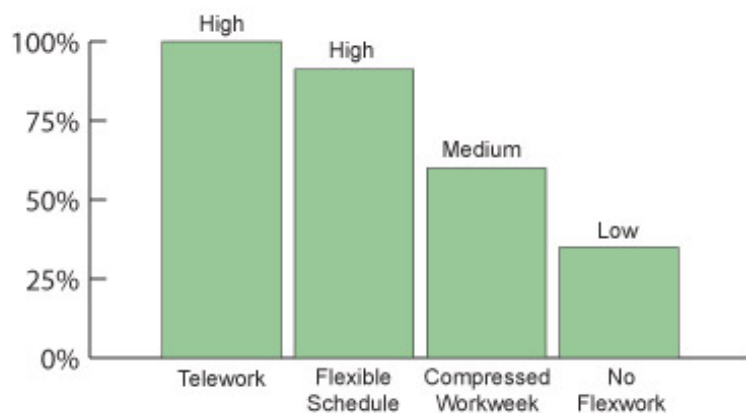
Department: IT

Supervisor/Manager: Alexis Smith

[Print This Page](#)

### Your Results

Below are numerical scores and a bar chart reflecting how applicable your job tasks are for each type of flexwork, as well as job tasks that are not suitable for any type of flexwork. These scores are estimates and provide an idea of how much time you will be able to work in a specific type of flexwork program. For example, a low "telework" score does not necessarily mean that you will not be able to do any teleworking. However, your job tasks may only be suitable for teleworking one day per month, versus a high score indicating a possible program of two days per week. This is a tool for you to use with your supervisor or manager to collaboratively design your flexwork program and is only one part of the overall process.



Category	Score	Percentage
Telework	28	80
Compressed Workweek	12	48
Flexible Schedule	22	73
No Flexwork	11	28

# Work Suitability Assessment Sample Worksheet

Welcome to the Work Suitability Assessment - Microsoft Internet Explorer provided by FedEx Kinko's


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Address [http://www.telecommutingadvantage.com/sb\\_wsa\\_2006/cgi-bin/new/results\\_statements.cgi](http://www.telecommutingadvantage.com/sb_wsa_2006/cgi-bin/new/results_statements.cgi) Go Links

**SHOW:**


### Telework

 Participate in face-to-face meetings (e.g., staff meetings, project meetings, team meetings, company meetings).

Specific Job Tasks	Total Time Per Week

 Participate in teleconferences, videoconferences or make phone calls.

Specific Job Tasks	Total Time Per Week

 Persuade, counsel, coach, or advise others in a manner that requires face-to-face contact.

Specific Job Tasks	Total Time Per Week

Done

Start | Session Information | AT&T Yahoo! Mail - ralbier... | Welcome to the Work ... | Microsoft PowerPoint - [J... | Internet



# Employee Suitability Assessment Sample Question

## Scenario 1 (A-001)

Cathy is a project manager who works from home five days a week. She frequently delegates project tasks to employees in the office but has found that a few employees are now consistently missing tasks, especially if she delegates them using e-mail. Cathy started to notice that this problem did not occur when she communicated via voice-mail. However, using voice-mail was more time-consuming and limited because she could not communicate nearly as much information nor send needed materials to the employees. Furthermore, many employees preferred the e-mail communications. If you were Cathy, you would:

<p><i>For the above situation, please rate the effectiveness of each action listed below.</i></p> <p><i>Fill in a circled number from 1 to 5 for each action on the Answer Sheet.</i></p>		Ineffective	Somewhat Ineffective	Somewhat Effective	Effective	Very Effective
a.	Continue to communicate via e-mail for all employees but leave a voice-mail message for those who prefer that medium to tell them to look for the specific e-mail message.					
b.	Communicate to each employee using the communication medium they prefer.					
c.	Hold a meeting with all employees to reach a compromise on one medium and employ only that going forward.					
d.	Ask the employees who are missing tasks what their concerns are regarding e-mail and try to come up with a solution.					
e.	Speak with the employees about why e-mail is a much better medium and try to get them to accept using e-mail.					

Please choose the **MOST EFFECTIVE** action. (Mark only one).    **a**    **b**    **c**    **d**    **e**

# Employee Suitability Assessment Sample Results Report Page

<b>COMPETENCY: RESULTS ORIENTATION</b> <b>SCORE = 82%</b> <b>Highly Acceptable with Areas to Observe</b>	
<b>III. Results Orientation</b> <p>This dimension conveys your ability to be focused on desired project outcomes, products and/or deliverables. It includes setting goals and priorities that maximize the use of the resources available to consistently deliver results against your organizational objectives and customer expectations. If you have difficulty in this area, you tend to get “bogged down” in details, work with current methods and tend to accept the old way of doing things as the best way, and view each obstacle as a separate or insurmountable problem instead of an opportunity to enhance results.</p>	
<b>SITUATION DESCRIPTION</b>	<b>YOUR RESPONSE AND THE OPTIMAL RESPONSE</b>
How to sell your ideas when you can't go to the office	<p>Your Response: Ask your supervisor to schedule news channel visits.</p> <p>Optimal Response: Send your ideas and questions to a co-worker to represent you when you are not physically in the office.</p>
Co-workers and business leaders unresponsive to your emails and calls for help while telecommuting	<p>Your Response: Accept it and continue to pursue them.</p> <p>Optimal Response: Send a summary of the information you need and the resources and cc: your supervisor.</p>
<p>Requiring additional meetings or the scheduling of events that cannot be predicted can impact your workgroup's productivity. In addition, you may cause resentment by requiring changes that impact others' work due to your telework arrangement. Try to use technology and additional effort on your part to resolve the issue. An increased reliance on technology to communicate, as opposed to walking down the hall, can be a transition for some employees. Identifying who these co-workers are and discussing what works for them is a good collaborative step. If this is not beneficial don't let it negatively impact your work. Make sure your supervisor is aware that breakdowns in this area are not the result of lack of effort or purely your telework arrangement.</p>	
<b>ACTION SUGGESTIONS</b>	
<ul style="list-style-type: none"> <li>• <b>ACTIVITY:</b> On each telework day, take 2 minutes at the beginning of your day (perhaps after you've checked email but before you begin any significant work task) to list a maximum of 3 things you intend to accomplish that day. Make sure you keep it to 3 or less things. Whenever you experience frustration or encounter a demanding situation, return to this list to re-focus yourself.</li> <li>• <b>BOOK:</b> Read a book about remote relationship management, such as “Influence without Authority” by Allan Cohen or “Telecommuting Success: A Practical Guide for Staying in the Loop While Working Away from the Office” by Gil Gordon (Foreword), Michael J. Dziak, Michael J. Dziak.</li> <li>• <b>ACTIVITY:</b> Facilitate 1 <i>virtual</i> meeting/event per quarter to discuss a current industry topic, to be attended by a cross-section of members of your organization and “friends and family” from other organizations. Document and circulate event minutes, follow-up on questions asked during the event that might not have been addressed, and note long-term implications of industry trends/events discussed.</li> <li>• <b>ACTIVITY:</b> Select 2 or 3 upcoming meetings or events before December, 2005 and concentrate on asking probing questions about end-results, making more supportive comments about goals and addressing fellow workgroup members' concerns. After each event, document how others reacted to your behavior and evaluate the outcome of each meeting in terms of how it contributed to meeting milestones and organizational objectives.</li> </ul>	