

Canadian Evaluation Society

Evaluation Case Competition 2003

Case for the Final Round June 2, 2003

“TELEWORK PROGRAM EVALUATION PLAN”

The Student Evaluation Case Competition is organised by the National Capital Chapter of the Canadian Evaluation Society.

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June 2, 2003

Dear CES Team 2003,

Your team has been chosen to compete for a contract to plan the evaluation of Department ABC's Telework pilot project. Attached you will find all the project documentation that has been developed to date.

Background:

Telework is an authorized working arrangement where employees perform all or part of their authorized work from home. Telework may be on a full-time, part-time or temporary basis (e.g., after a short-term illness or injury). Teleworkers are not the same as employees on travel status, or those who occasionally work from home during off hours. Teleworkers must be accessible to their supervisors and colleagues by phone and e-mail during pre-determined core working hours.

The policy to implement telework stems from concerns that employees have expressed regarding balancing their family responsibilities (young children and elderly parents) with work, as well as commuting time. Telework is considered to be an efficient way to complete work from home, and Department ABC has decided to implement the telework policy in order to be more flexible as an employer and to help improve employee work-life balance.

Task:

You have 5 hours to create a proposal on how you would deal with the various issues that are involved with this project. We look forward to hearing your proposal. Thank you, and good luck!

1. In preparing the Department for this policy, please suggest any changes/improvements that should be made to the outline of the evaluation plan and the draft performance indicator table.

Discuss how these changes/improvements will impact the project - the telework policy, or the evaluation (in terms of outputs and outcomes)?

2. Design the staff survey and the structured interview protocol for the pilot participants. Discuss how the data will be analyzed.

3. Indicate the timing and frequency of collection for the various data source/data collection methods contained in the draft performance indicator table. If necessary, make changes to these data sources and data collection methods and justify the changes.

4. Preliminary telework working group findings show that some managers are concerned with implementing the telework policy. Some managers are sceptical about the

productivity of staff when they are away from the office, and the inevitable changes in staff communication and interaction. These managers have been hesitant to support the telework pilot project because of concerns over control, performance measurement, declines in productivity and teamwork, scheduling meetings, communications, employee health and safety, higher costs, and being responsible for the work of employees they would not always see. In order for the telework policy to work, buy-in of both managers and employees is necessary and key to the successful implementation of the telework pilot project within the organization.

Please explain how you would deal with negative managers and employees and how you can better address their concerns within the scope of the evaluation.

Good luck!

François, Amna, Lisa, Mary Kay, Lisa, and Afroditi
The 2003 CES Student Evaluation Case Competition Organising Committee

APPENDIX 2 - QUESTIONS AND ANSWERS

General Questions

- 1. What is telework?** Telework is an authorized working arrangement where employees perform all or part of their authorized work away from the official workplace. Telework may be on a full-time, part-time or temporary basis (e.g., after a short-term illness or injury). Teleworkers are not the same as employees on travel status, or those who occasionally work from home during off hours. Many employees access Department ABC's electronic network for e-mail purposes. This program does not apply to these activities and does not impede such access in any way.
- 2. Can anyone telework?** Only an indeterminate employee who has completed his/her probationary period coupled with at least one year of employment in his/her current position and whose performance has been rated at least at a fully satisfactory level in the year prior to entering into a telework arrangement can telework. Furthermore, the employee in question must meet the eight fundamental policy principles and requirements as well as the other additional requirements outlined in this policy and appendices.
- 3. Do employees have a right to telework?** No. Participation in the telework program is not a right but a work arrangement that is mutually satisfactory. Participation is subject to an agreement between employees and their managers, based on the policy and appendices requirements. However, in accordance with their Terms and Conditions of Employment, employees have the right to grieve the denial of a telework request.
- 4. Are there potential limitations in employee participation?** A number of limitations may affect approval, or continuing in telework arrangements. Aside from the policy requirements, these include the initial and ongoing suitability of each situation, and the availability of equipment and technical support, as well as equipment, cost, employee performance and operational issues.
- 5. I currently telework informally within Department ABC. How does my status change with this pilot program?** Effective now, and for the duration of the telework pilot, all approved telework must follow these provisions. We strongly recommend that existing informal teleworkers adopt and follow this policy, including its appendices. This will enable us to provide better support and will give a more complete picture of the telework environment within Department ABC. Ad-hoc, non recurring arrangements can still take place and follow the spirit of the telework policy without falling into its full scope. Furthermore, we will not revoke existing permissions. This pilot policy must apply in either of the two following situations: there is a recurring use of Department ABC's owned equipment away from the regular workplace, or there is a recurring need to perform work away from the regular workplace during normal working hours. In all other cases, the spirit of this pilot program should be followed by adhering to its broad principles but not necessarily all its detailed requirements.
- 6. What types of jobs are adaptable to telework?** Each case must be judged individually, with the final approval resting with management. Certain qualities might make some jobs more adaptable to telework. For example, project-oriented tasks such as reading proposals and reviews, conducting research, easily quantifiable tasks and some administrative tasks are easily adaptable to telework. Some client service jobs such as dealing daily with enquiries, with "walk-in" clients, situations where there is a requirement to work in an onsite team environment or where highly sensitive material is handled, might not be suitable for telework.
- 7. Can a supervisor require an employee to telework?** A supervisor cannot require an employee to telework. Telework is a completely voluntary work option — for employees and for managers.

8. **Can telework be combined with child or elder care?** Some short-term elder-care or child-minding needs can be combined with telework, however, approval is necessary. Both the supervisor and the employee need to have a very frank and open discussion of all the reasons behind a potential telework arrangement, including the employee's child or elder care considerations. If either or both of these situations result into a potential telework situation, the supervisor and employee need to establish work scheduled hours and performance objectives consistent with the need for flexibility and work-life balance.
9. **Under the telework policy, can an employee work in a location other than the home?** Yes. There is no absolute requirement that the telework be situated solely in the home. The key is that proposed arrangements meet with the requirements of the policy and its appendices, and that the immediate supervisor and director have approved the arrangement.
10. **What happens if I am needed back at the office?** Teleworkers must be prepared to come into the office should some crisis or other operational need occur. Managers should make best efforts to give reasonable notice in such cases.
11. **Can teleworkers take time off for medical reasons while at home?** Yes. Teleworkers have exactly the same entitlements for leave as when they work in the official workplace. However as with any other employee, they are required to follow the appropriate procedures for requesting leave, and for having it approved.
12. **Can telework be for a short duration, say an afternoon?** As a completely voluntary arrangement that can be terminated at any time, telework can be for a specific, even short-term, period. An example might be an employee recovering from an illness, who is well enough to work, but not yet feeling strong enough to commute.
13. **Can telework be for the entire week?** Yes, but this should be the exception rather than the rule as it may have a negative impact on the work unit. Furthermore, managers and employees should be aware that full-time teleworking can cause some employees to experience negative effects such as feelings of isolation, loss of social interaction, and being out of touch with the office milieu and events. Therefore, while there is no prohibition on full-time telework, both managers and employees are well advised to carefully consider the possible impacts of such an arrangement.
14. **Can telework be combined with part-time employment?** Provided that the basic requirements of the policies involved are respected, telework can be combined with part-time or any other flexible working arrangement.
15. **How can I convince my boss that I should be allowed to telework?** If you believe that the request would meet all the requirements and examples outlined in the Telework Pilot Program, notably the eight fundamental policy principles and requirements, talk to your supervisor. Remember that a telework arrangement must be made on a voluntary basis by both supervisor and employee. For a telework arrangement to be successful, both parties must feel comfortable with it. Final authority rests with management, that is, the immediate supervisor and director.
16. **What is the Telework Agreement Form and do I need one?** Completion of the Telework Agreement Form is required to confirm approval and the conditions of the telework arrangement. The Telework Agreement is designed to ensure that the terms of a telework situation are mutually understood and spelled out, prior to the commencement of such an arrangement.
17. **Will Department ABC offer training for employees and their managers on telework?** Yes. The telework orientation session for employees will cover such topics as: conditions which must apply, personal and work suitability, preparing for telework (organizing home

office, time management), and maintaining effective communications. The telework orientation session for managers will cover some of the same topics covered in the employee orientation session, but will also include such topics as: assessing suitability, managing at a distance, terminating telework arrangements, and communicating effectively.

Telework Equipment

18. **What equipment is needed to telework?** The equipment requirements will depend on the work to be done. Some employees may need only basic office supplies. Other employees may require a computer. Still others may require a modem or dedicated terminal to communicate with colleagues and access the information needed to do their jobs. It is the manager's responsibility to determine the requirements in consultation with corporate service providers and arrange for the appropriate equipment to be provided.
19. **Who will supply the necessary equipment?** Department ABC will supply the high-tech equipment needed. It is expected, however, that the employee will provide items normally found in most home offices, such as his or her own telephone etc. Unless there are compelling reasons to do so, Department ABC will not normally be involved in the purchase or provision of furniture for the home office.
20. **Can teleworkers use their own computer and related equipment?** For the duration of the pilot, it is preferable that only equipment supplied by Department ABC be used. This makes it easier for Department ABC to minimize risk and productivity losses due to such problems as viruses, software compatibility and unsuitable home equipment. This approach will also help reduce the risk of compromising sensitive information over Department ABC's databases and networks. However, not all teleworkers will require full connection to Department ABC network. Some, for example, may only need to access their e-mail and scheduler. IT requirements will be determined relative to the needs of each teleworker.
21. **What use can I make of Department ABC's software and equipment?** As when at the official workplace, Department ABC's software, hardware or the electronic network is to be used only for Department ABC related activities. While teleworkers may use these resources for professional and career development purposes, conducting a private business, personal gain or political activities are unacceptable uses.
22. **What happens if the equipment requires repair?** Only persons authorized by ISD may install software or maintain, repair or replace Department ABC's electronic equipment. Teleworkers or their supervisors must notify ISD of all breakdowns. Equipment issues not easily resolved by remote support may require the equipment to be brought in to the official workplace. Where repairs are extensive, and replacement impractical, teleworkers may be asked to report back to the official workplace until the equipment is operational.
23. **What level of service can a teleworker expect from corporate service providers (i.e., CASD)?** ISD will try to accommodate teleworker support requirements during normal business hours, which are from 8 a.m. to 5 p.m., Monday to Friday.
24. **Who is going to transport and set up equipment in the employee's home office?** During the pilot Department ABC will transport and install computer equipment and connections to and from teleworker home offices. Depending on the situation, some teleworkers may be authorized to transport equipment. For example, small and easily transportable equipment, or returning defective equipment by personal automobile. Where employees are authorized to transport computers and other peripherals, the ISD Helpdesk staff can provide instructions on unhooking and transporting.

25. All Department ABC's owned equipment must be returned when requested by management, or at the end of each telework arrangement.

Operational Questions and Answers for Managers

26. **Can supervisors telework?** The telework program is intended for any employee including supervisors, provided they meet the requirements of the telework policy and appendices.
27. **What level of management can approve a telework arrangement?** Supervisors at any level are responsible for recommending an employee for telework and for outlining the terms (i.e. scheduling, equipment requirements, work expectations, and assessment criteria). Final approval must be obtained at least at the director level. In addition, for the pilot project, if there is a large number of requests originating from one division, its management team will assess the operational feasibility of the sum of these requests. Divisions will then submit the names of their proposed telework participants to the CASD Telework Working Group for a determination of the feasibility based on the availability of support resources from CASD. Should the number of requests put forward exceed the maximum of fifteen to twenty requests, the working group would present a list to HRC of all requests. HRC in turn would ensure that the submitted requests constitute a diverse and representative sample of the different directorates/divisions at Department ABC. If this is not the case, some requests might not be accommodated for the pilot.
28. **How should a manager decide if an employee's request to telework should be approved?** All telework situations should be in a fair, equitable and transparent manner. Each request should be dealt with on a "case by case" basis, and taking the requirements of the telework policy into consideration. Failure to meet any of these requirements can justify denying the request.
29. **Which employees are best suited for teleworking?** Experience has shown that successful teleworkers are well organized self starters who can work independently. They are results oriented, have a history of reliable and responsible performance with a proven track record and are trustworthy.
30. **How can telework accommodate employment-related needs for employment equity designated group members?** Telework can help accommodate employees with health problems or disabilities while they are still able and willing to work. As with any employee, equipment should be provided based on an evaluation of needs and duties, and take into account the individual's health, the work environment etc.
31. **How do I know employees are working if I can't see them?** The same way you know about employees at the official workplace — if he or she meets the job requirements on time and up to expected quality. Experience elsewhere shows that productivity often increases with telework, partly because of fewer interruptions and distractions, as well as an increase in personal motivation and work commitment. In addition, most telework employees report a reduction in stress, which often leads to increased efficiency and increased job satisfaction.
32. **How will employees who telework be reviewed?** The same as for employees at the official workplace. As for all employees, Department ABC's performance management process will be the process used for setting objectives and reviewing results. Work performance areas such as productivity should be measured in the same way as if the work was being done at Department ABC's work site. Management by results rather than visual management is the key. Managers should consider communications practices which allow them to stay in touch with their teleworkers on a regular basis (e.g., e-mail, telephone, regular staff meetings).

33. **Should a specific schedule be set for the off-site work?** Yes. A description of the employee's authorized days and/or hours of work away from the official workplace must be clearly outlined in the Telework Agreement. Schedules and full contact information (e.g., home and/or cell phone numbers) should be clearly posted in the official workplace and provided to co-workers.
34. **Will teleworkers lose their offices during the Telework Pilot?** No. As Department ABC is committed to ensuring that each of its employees work in appropriate and safe accommodations, teleworkers will retain their assigned offices. However, managers may temporarily accommodate other employees in these offices during the absence of the teleworkers.
35. **What about the impact on staff at the official workplace when some employees are teleworking?** Possible impact on other employees must be considered during the approval process of a telework arrangement. One person's off-site work should not adversely affect the performance of other employees or place a burden on staff remaining in the official workplace. Research demonstrates, however, that when fewer employees work at the official workplace, the administrative workload decreases. The teleworker must keep colleagues and supervisors informed of any files that are kept at the designated home office. This way, anyone needing access to such information is aware of its location and how to access it. A manager must discuss this and other particular aspects of how the telework arrangement will function prior to entering into a formal agreement. Should colleagues or clients complain of constant lack of opportunities to meet face to face or an ongoing difficulty to reach the teleworker during scheduled working hours, telework arrangement can be reviewed, modified or terminated.
36. **If an employee teleworks, does the home office become the official workplace?** No. The employee's official workplace is the place where the employee would work if there were no telework situation.
37. **What if a manager believes the arrangement with an employee is not working out?** Either the employee or the supervisor may terminate a telework arrangement. In such circumstances, they should strive to provide at least a two-week notice prior to ending the arrangement.
38. **What happens if there is an external strike affecting Department ABC?** Each strike situation is different and needs to be reviewed case by case by management and in concert with Department ABC labour relations advisors. Some of the key issues revolve around protection of government equipment and property, personal safety of employees, and maintenance of service to the public.

Questions on Costs, Taxes and Zoning

39. **What costs may be covered by Department ABC?** Department ABC will assume the costs of any required equipment and its maintenance. It will also reimburse teleworkers for reasonable expenses essential to discharge their authorized duties. This may include costs for long-distance telephone calls or basic office supplies. Such expenses must be pre-authorized and respect Department ABC's financial policies.
40. **What costs does the teleworker assume?** Teleworkers are responsible for supplying and maintaining their home offices, including the costs of heat, hydro, extra insurance, (they are therefore advised to consult their insurance carriers) and any commuting costs for travel between the home office and the official workplace.
41. **Does an employee who uses a portion of his or her home as an office qualify for any federal income tax deductions?** Depending upon the situation and provided certain

conditions are met, teleworkers may be able to deduct certain expenses from their employment income for income tax purposes. Due to the complexity of the *Income Tax Act* and the fact that each telework situation is unique, employees should contact the Canada Customs and Revenue Agency (CCRA) for further advice. Telephone inquiry numbers and other information can be found on their Web site at www.cra-adrc.gc.ca.

42. **Should managers sign CCRA income tax forms when asked by employees?** Employees who wish to claim certain income tax expenses are required by the Canada Customs and Revenue Agency (CCRA) to file form T2200 (Declaration of Conditions of Employment) with their income tax returns. Managers (or the Finance division on their behalf) who are asked by formally approved teleworkers to complete and sign the T2200 are advised to do so. This form does not ask managers to certify whether an employee meets the criteria established by the *Income Tax Act*. Rather, in signing, managers would merely certify that teleworkers are required to provide work spaces in their homes and are required to pay for certain additional costs involved in providing this space. See www.cra-adrc.gc.ca/E/pub/tg/t4044eq/t4044eq-04.html#P362_27275 for more information.
43. **Are there any municipal or provincial requirements for teleworking?** Employees are responsible for informing themselves of any municipal or provincial restrictions that could have an impact on their telework situation, for example, zoning bylaws or the requirement for smoke detectors in homes and home offices).

Questions on Safety, Health and Security

44. **What about liability for injuries sustained while teleworking? How will the department deal with an employee's claim for injury?** Under the *Government Employees Compensation Act*, Department ABC's employees who are injured in the course of their authorized duties are to be compensated for those injuries. This is the case whether the injury takes place at the employer's official workplace or at any other location (i.e. the employee's home).
45. **How do I ensure that the home office is safe and ergonomically sound?** Most of our homes already have a relatively safe and secure environment. Though Department ABC has no formal control over an employee's home office, employees are still required to meet safety requirements to protect themselves and any equipment provided by the employer. Reading and understanding the safety and health provisions of this policy and appendices will help employees understand what their responsibilities are. Please refer to Appendix 5 regarding tips for setting up a safe home office.
46. **Will the security of information be placed at risk by employees when teleworking?** Every employee must respect the employer's security standards, whether at the official workplace or in their home offices. When approving telework arrangements, managers must ensure that each telework situation will not jeopardize security requirements. Some materials may not be removed from the official workplace under any circumstances, for example, Protected C, confidential, secret or top secret documents or information. However, with approval and under certain circumstances, some sensitive material may be moved to the home office. In such cases, teleworkers must, after communicating with the Security Program Coordinator for advice and guidance, take the necessary steps to reduce any risk of sensitive information being left unattended or exposed to unauthorized scrutiny. Teleworkers should also handle unclassified material with care. The accumulated information may be sensitive for the organization, and teleworkers should consider the nature of the information they work on and take care to ensure that it is not left unattended or exposed to unauthorized scrutiny. Teleworkers must be aware of all Access to Information and Privacy legislation that apply to any information with which they will be working.

APPENDIX 3 - TELEWORK AGREEMENT FORM

EMPLOYEE APPLICATION

Name _____	Position title _____
Division, etc. _____	Workplace tel. no. (____) _____
Home office address _____	
Home office tel. no. (____) _____	Cell tel. no. (____) _____
Proposed telework days (days of the week) _____	
Proposed duration (in days or weeks) _____ or end date _____	Current hours of work: from _____ to _____
Approximate time and distance of one-way commute from home office to official workplace: ____ minutes; and ____ km ^[1]	

SUPERVISOR'S CHECK LIST

Employee understands and agrees to respect the Telework Pilot Program and its guidelines, including, but not limited to, the following requirements (check boxes as appropriate):

- The Prospective teleworker has completed his/her probationary period coupled with at least one year of employment in the current position and at least a fully satisfactory performance rating in the year prior to entering into a telework arrangement.
- Participation in telework arrangements is voluntary, and may be cancelled at any time by the employee or supervisor and authorizing director. Each should strive to provide at least two weeks' notice.
- A telework arrangement must be operationally feasible; clients and co-workers should not be negatively affected.
- Parties to a telework arrangement agree to take telework orientation prior to commencing telework.
- Existing terms and conditions of employment, legislation, government policies, etc., continue to apply.
- Department ABC will provide equipment, supplies and maintenance; teleworkers will provide costs for premises, insurance, heat, hydro, etc.
- Teleworkers will return to the official workplace from their telework location when requested.
- The applicant is encouraged to consult with his/her employees' representatives before undertaking a telework arrangement.
- Performance expectations have been discussed and are understood.
- The teleworker has completed the "Teleworker Self Assessment Guide," and read the "Tips for Setting up a Safe Home Office."
- The teleworker agrees to safeguard Department ABC's owned equipment.

EQUIPMENT ROSTER

The following equipment is requested for the teleworker during this telework arrangement:

Item _____	Description _____
Item _____	Description _____
Item _____	Description _____

^[1] For evaluation purposes

Item _____	Description _____
Item _____	Description _____

SIGNATURES AND AGREEMENT

Employee's signature _____	Date _____	
Supervisor's signature _____	Date _____	Tel. no. (____) _____
Director's signature (final approval) _____	Date _____	Tel. no. (____) _____
Agreed telework days (days of the week) _____		
Proposed duration (in days or weeks) _____ or end date _____		Approved hours of work: from _____ to _____
If <i>not</i> approved, state why ^{2[2]} _____		

Copies: — To be kept by: (1) teleworker; (2) supervisor; (3) authorizing director; (4) HR; (5) ISD; (6) Admin.; (7) Fin.
 — Supervisor to retain copy of form for duration of pilot.

^{2[2]} For evaluation purposes

APPENDIX 4 - TELEWORKER SELF-ASSESSMENT GUIDE

Do you have what it takes to be a successful teleworker? This guide should help give you a good understanding of what is involved. Rank yourself by checking the boxes with the choice that best reflects your situation. Insert a number from 1 to 5 (1– lowest, 3 – neutral, and 5 – highest).

SUITABLE EMPLOYEE

- I have a good understanding of telework and the requirements of the Telework Pilot Program.
- I am familiar with Department ABC, its culture, its policies and its procedures, and I have completed my probationary period coupled with at least one year of employment in my current position with at least a fully satisfactory assessment from my supervisor in the year prior to entering into a telework arrangement.
- I would be prepared to learn more about telework, by taking a telework orientation session.
- I have a history of good performance ratings.
- I consider myself to be self-motivated in my approach to work, and self-disciplined at avoiding distractions.
- I possess good time management and organizational skills.
- I don't need continual supervision or feedback on my work.
- I have no problem working alone for long periods of time.
- I have a relatively low need for social interaction with co-workers, and others at the official workplace.

I communicate well with supervisors, co-workers and clients.

If allowed to telework, I would be willing to return when required.

SUITABLE JOB

My job, or parts of it, can easily be carried out from a home office.

My job does not require frequent or unscheduled face-to-face meetings at the official workplace.

The duties that I propose for telework would respect the requirements of the Security Policy.

My job does not require continual access to specialized files or equipment that are available only at the official workplace.

SUITABLE HOME-OFFICE ENVIRONMENT

My home-office environment respects requirements of the Telework Pilot Program, including Appendix 5: "Tips for Setting up a Safe Home Office."

My home office is isolated from distractions such as noise or domestic activities.

There are no zoning or other restrictions that would prohibit telework in my home.

SUPPORTIVE SUPERVISOR

My supervisor and I have a good relationship based on mutual trust

APPENDIX 5 - TIPS FOR SETTING UP A SAFE HOME OFFICE

Teleworkers setting up their home offices should respect the terms of Department ABC's Telework Pilot Program and its Safety and Health Policy. The following checklist is designed to give you a general appreciation of the appropriateness of your home office for safe and successful telework.

THE ACTUAL OFFICE WORK SPACE

- **Quiet and isolated** — Home office is isolated from distractions such as noise or domestic activities.
- **Comfort** — Temperature and ventilation can be controlled to allow safe and effective work.
- **Lighting** — Task lighting, ideally mixed with natural lighting, should be from the side or behind the line of vision and ensure comfort and good visibility of the work at hand. There should be no reflections on or glare from the computer monitor.
- **Protection** — The home office and work-related materials and equipment are reasonably secure and protected against intrusion, robbery, damage or misuse.
- **Insurance** — The home office is insured (e.g., the appropriate homeowner's or renter's insurance) to cover loss, damage or injury to employee-owned real or personal property, or to those visiting the home office.
- **No general obstructions** — Aisles, doorways, and corners are free of obstructions and permit free movement.
- **Fire and smoke** — There are smoke alarms, carbon monoxide detectors where applicable (for example with fuel-burning appliances), and clear access to a fire extinguisher.
- **Electrical** — The electrical system in the home is adequate, and will not be overload by the intended equipment. Outlets are grounded.

- **Cords and wiring** — Telephone lines, electrical cords, extension wires, computer cords etc. are all neatly secured out of the way, for example, under a desk or along a baseboard.
- **First aid** — First aid supplies are readily accessible and adequate.

ERGONOMIC CONSIDERATIONS

- **Desk and work surface** — The desk is the correct height and sturdy and large enough to handle any material or equipment needed (for example, computers, printers, fax machines, files, etc.).
- **Chair** — The chair is solid and adjustable, and provides good lumbar back support. It can be adjusted so that feet are flat on the floor or on a footrest, and so that knees are at hip level and bent at a 90-degree angle.
- **Keyboard/mouse** — The keyboard can be adjusted so that the arms rest loosely, elbows bend at 90 degrees, and forearms are parallel to, or slightly lower than, the floor. Wrists should be fairly straight and relaxed, and rest on palm rest in between keystrokes. Remember to relax and strike the keys softly.
- **Document holder** — Set the holder close to the screen to avoid unnecessary head and eye movement. Intermittently rotate it to the other side of the screen for a rest.
- **Keep moving** — Don't sit in one position for extended periods. Stand and take stretch breaks every once in awhile. Blink often to keep your eyes lubricated. Periodically look away from the screen and focus on distant objects.
- **Monitor** — Ensure the monitor allows you to easily read the text on your screen without strain of any type. The screen should be directly in front of you, approximately an arm's length

away, and adjusted to avoid reflections. The top of the screen should be at or slightly below eye level.

APPENDIX 6 - TELEWORK PROGRAM EVALUATION PLAN

INTRODUCTION

This document outlines the evaluation criteria that will be used to demonstrate the effectiveness of teleworking at Department ABC.

The objectives of the evaluation are to determine:

- the overall costs of the program;
- the overall benefits of the program;
- the overall cost/benefit ratio of the program;
- what if any adjustments are required to the program; and
- if the program should continue beyond the pilot phase.

EVALUATION METHODOLOGY

The evaluation should be held ten to twelve months after the start of the pilot. The evaluation will include data received from questionnaires sent to the teleworkers, their managers/supervisors and a number of co-workers; as well as data from one-on-one interviews and other data collected by the service providers.

The unique nature of telework makes it reasonably possible and defensible to conduct "subjective evaluations." This type of evaluation focuses on the solicited experiences and reactions of those who had been involved throughout the pilot. For example, such evaluations assume that after-the-fact perceptions of managers, workers, and co-workers related to changes in productivity are defensible and viable, provided there is some unanimity of opinion. The evaluation will also include hard data such as actual costs, absenteeism rates, etc.

EVALUATION CRITERIA

1. Teleworkers — the telework experience

- Geographical location of home office.
- Commuting patterns: distance, mode, commuting time.
- Reasons for teleworking.
- Reason for ending telework.
- Telework schedule — frequency, days (or hours) per week.
- Home office characteristics (e.g., private room, quiet, etc.).
- Impact of telework on:
 - Work/life balance;
 - Child and family care responsibilities;

- Morale and job satisfaction;
 - Stress;
 - Commuting time;
 - Personal costs, including those of “going to work”;
 - Productivity and ability to meet work objectives and manage time more effectively;
 - Absenteeism rates – for all reasons – before and during telework;
 - Voluntary unpaid overtime;
 - Social isolation; and
 - Career — did “out of sight, out-of-mind” have any impact on promotions, etc.?
- Suggestions for improving the program.
 - Should the program be expanded?

2. Managers and the telework experience

- Reasons for approving, denying and/or ending telework.
- Impact of telework on:
 - Ability to manage;
 - Professional relationships/teamwork;
 - Non-teleworking colleagues;
 - Teleworker productivity;
 - Office routines;
 - Overall efficiency of the section;
 - Worker morale: teleworkers and co-workers; and
 - Communications — with, and by, teleworker and co-workers.
- Would the manager telework if given the opportunity?
- Can the manager demonstrate that telework complies with the policy?
- Has the manager maintained a list of teleworkers?
- Suggestions for improving the program.
- Should the program be expanded?

3. Non-teleworking co-workers

- How have teleworkers impacted their own productivity, job satisfaction, office routine, etc.?
- Would they telework if given opportunity?
- Suggestions for improving the telework program.
- Should the program be expanded?

4. General organizational impacts of telework on:

- Overtime — paid and unpaid;
- Absenteeism;
- Morale;
- Scheduling of meetings;
- Recruitment capabilities: does telework have any impact on making working at Department ABC more attractive?
- Emergency preparedness: did telework allow work to continue during emergencies and shutdowns such as snow and ice storms, floods, earthquakes, hurricanes, bomb threats, cyber attacks, political unrest, explosions, fires, power outages, transportation strikes and other labour disputes? If not, is there a clear potential to do so?
- Potential to reduce pollution, thus contributing to Canada's clean air objectives: for example, overall mileage & pollution avoided.

5. Overall program admin and support

Sr. Mgmt.	<ul style="list-style-type: none"> • Impressions of one or two senior executives on program success. • Suggestions for improving the program, e.g., on scope, funding, and support. • Should the program be expanded?
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HR	<ul style="list-style-type: none"> • Overall number of teleworkers. • Gender and age breakdowns. • Job type — categories and groups. • Disability status. • Approximately how long in current job? How long at Department ABC? • How much advice and time was required to manage the program (advice, answering questions, training etc.)? • Were copies of signed Telework Agreement Forms kept on file? • Were statistics adequately maintained?
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	<ul style="list-style-type: none"> • Impact of telework on overall absenteeism rates – for all reasons. • Suggestions for improving the program. • Should the program be expanded?
ISD	<ul style="list-style-type: none"> • How much advice and time is required to manage the telework program (advice, support, providing remote access, etc.)? • Impact of telework on Department ABC's network. • Level of IT support. • Was a list of Department ABC owned equipment and software maintained? • Ongoing maintenance/remote access costs (includes average costs per teleworker for telecommunications, remote access, support, Internet access, depreciation and replacement). Compare with original estimate of \$2,000. • Suggestions for improving the program. • Should the program be expanded?
Admin	<ul style="list-style-type: none"> • Was a list of Department ABC owned equipment and furniture kept? • Suggestions for improving the program. • Should the program be expanded?
Finance	<ul style="list-style-type: none"> • Degree and level of advice related to telework tax obligations.
ISD/Admin	<ul style="list-style-type: none"> • One-time cost to equip teleworkers. • Estimated costs for IT, equipment, furniture, phones, hardware, etc. • Compare actual amount with Department ABC's original estimate of \$4,600 per teleworker.

Draft Preliminary Performance Indicators – Telework Policy

Potential Outputs and Outcomes	Indicators	Data Source/Data Collection Method	Responsibility for Collection
<i>Final Outcomes (measured after 5 years of telework policy implementation)</i>			
Reduction of Department ABC’s operating costs	<ul style="list-style-type: none"> • Reduction of operating costs due to telework 	<ul style="list-style-type: none"> • Cost-benefit analysis 	<ul style="list-style-type: none"> • Telework Working Group
Increased morale across Department ABC	<ul style="list-style-type: none"> • Comparison of staff morale pre- and post-implementation 	<ul style="list-style-type: none"> • Staff survey 	<ul style="list-style-type: none"> • Telework Working Group
Improved staff recruitment and retention	<ul style="list-style-type: none"> • New employees choose to work in Department ABC due to the telework policy 	<ul style="list-style-type: none"> • Staff survey 	<ul style="list-style-type: none"> • Telework Working Group
	<ul style="list-style-type: none"> • Perceptions of staff regarding causes of retention 	<ul style="list-style-type: none"> • Staff survey 	<ul style="list-style-type: none"> • Telework Working Group
<i>Intermediate Outcomes (after pilot period of one year)</i>			
Increased job satisfaction for teleworkers	<ul style="list-style-type: none"> • Self-reported job satisfaction level (pre & post) • Self-reported feeling of inclusion in office life (pre & post) • Self-reported feeling of being penalized because of telework (pre & post) 	<ul style="list-style-type: none"> • Structured interviews with pilot participants • Structured interviews with pilot participants • Structured interviews with pilot participants 	<ul style="list-style-type: none"> • Evaluation Group • Evaluation Group • Evaluation Group

<p>Improvement of work-life balance for teleworkers</p>	<ul style="list-style-type: none"> • Self-reported feeling of isolation of teleworkers (pre & post) • Self-report stress level of teleworkers (pre & post) • Estimated paid and unpaid overtime per week (pre & post) • Estimated personal costs to teleworker (pre & post) 	<ul style="list-style-type: none"> • Structured interviews with pilot participants • Structured interviews with pilot participants • Review of overtime forms and structured interviews with pilot participants to confirm • Structured interviews with pilot participants 	<ul style="list-style-type: none"> • Evaluation Group • Evaluation Group • Evaluation Group (if these forms can be released, otherwise HR can summarize) • Evaluation Group
<p>Increased teleworker productivity</p>	<ul style="list-style-type: none"> • Absenteeism rates of teleworkers (pre & post) • Productivity rate of teleworkers 	<ul style="list-style-type: none"> • Review of monthly leave forms • Structured interviews with telemanagers 	<ul style="list-style-type: none"> • Evaluation Group (if these forms can be released, otherwise HR can summarize) • Evaluation Group
<p>Managers are comfortable with teleworking</p>	<ul style="list-style-type: none"> • Understanding the benefits of teleworking for Department ABC • Understanding of need 	<ul style="list-style-type: none"> • Structured interviews with telemanagers • Structured 	<ul style="list-style-type: none"> • Evaluation Group • Evaluation Group

	<p>for work-life balance</p> <ul style="list-style-type: none"> • Increased interest among staff towards participating in telework 	<p>interviews with telemanagers</p> <ul style="list-style-type: none"> • Staff survey 	<ul style="list-style-type: none"> • Evaluation Group
<i>Immediate Outcomes (during the pilot period)</i>			
Other staff are able to pursue their own work with minimal disruption	<ul style="list-style-type: none"> • Teleworkers are accessible during regular work hours for consultations or meetings • Self-reported co-worker burden caused by telework 	<ul style="list-style-type: none"> • Staff survey • Staff survey 	<ul style="list-style-type: none"> • Evaluation Group • Evaluation Group
Quality and quantity of work produced by teleworkers is at least equal to what it was in the official workplace	<ul style="list-style-type: none"> • Opinion of supervisors of quantity and quality of work performed by teleworker 	<ul style="list-style-type: none"> • Structured interviews with telemanagers 	<ul style="list-style-type: none"> • Evaluation Group
<i>Activities and Outputs</i>			
Advice and support are provided to teleworkers	<ul style="list-style-type: none"> • Number of hours spent by CASD staff on teleworker support 	<ul style="list-style-type: none"> • CASD records 	<ul style="list-style-type: none"> • Telework Working Group
Telework orientation sessions are held for managers and participating employees and are considered useful by attendees	<ul style="list-style-type: none"> • Number of sessions held • Number of attendees at each session 	<ul style="list-style-type: none"> • Telework Working Group records • Telework Working Group records 	<ul style="list-style-type: none"> • Telework Working Group • Telework Working Group

	<ul style="list-style-type: none"> • Number of managers at each session • Satisfaction level of attendees 	<ul style="list-style-type: none"> • Telework Working Group records • Session evaluation survey 	<ul style="list-style-type: none"> • Telework Working Group • Evaluation and Telework Working Group
Department ABC supplies, installs and maintains equipment	<ul style="list-style-type: none"> • Number and type of equipment provided to teleworkers • Initial cost of providing equipment • Cost of ongoing maintenance (repairs, modifications, etc) 	<ul style="list-style-type: none"> • ISD and Administration Records • ISD and Administration Records • ISD and Administration Records 	<ul style="list-style-type: none"> • ISD and Administration • ISD and Administration • ISD and Administration
Candidates apply and those successful are approved	<ul style="list-style-type: none"> • Number of applications approved • Number of applications rejected • Reasons for rejections 	<ul style="list-style-type: none"> • Telework Working Group records • Telework Working Group records • Telework Working Group records 	<ul style="list-style-type: none"> • Telework Working Group • Telework Working Group • Telework Working Group

	<ul style="list-style-type: none"> • Socio-demographic characteristics of applicants 	<ul style="list-style-type: none"> • Telework Working Group records 	<ul style="list-style-type: none"> • Telework Working Group
Information is disseminated to the Department ABC about the telework policy and its useful to staff	<ul style="list-style-type: none"> • Types of mechanisms used to disseminate information to Department ABC about telework policy • Satisfaction rates of staff regarding the information provided about telework policy 	<ul style="list-style-type: none"> • Telework Working Group records • Staff survey 	<ul style="list-style-type: none"> • Telework Working Group • Evaluation Group

Telework Policy Pilot

Outline of Evaluation Plan

Background

A telework policy has recently been developed for Department ABC employees and a pilot period for the policy will begin on July 1st, 2003. The objectives of the policy are to help employees achieve a better balance between their personal and professional lives and by helping Department ABC to create a more flexible and productive work environment, which will lead to improved levels of service and reduced operating costs. The purpose of the policy is to provide guidance and direction to achieve these objectives. An evaluation of the pilot is being planned in order to collect data throughout the pilot period and assess the impact of the policy on Department ABC's staff and management.

Evaluation of the Pilot

The evaluation will focus mainly on implementation issues and shorter-term results, since only these can be adequately assessed after a one-year period. Recommendations will be made regarding potential modifications to the policy based on the data gathered throughout the pilot period. Multiple lines of evidence will be used to answer the evaluation questions and will be determined during the development of an Evaluation Framework.

Development of Evaluation Framework

An Evaluation Framework has been produced by the Telework Working Group. They have identified evaluation issues and questions that will be explored in the pilot as well as, the methodology used for data collection. The Framework specifies resource requirements and data collection instruments for the study (see attached outline).

Interviews will be held with various participants in the teleworking process, including candidates for teleworking, their managers, and representatives from the groups most affected by the policy (i.e., Human Resources, Finance, ISD, Administration, etc). These interviews will allow the evaluation team to better identify the issues and specific questions relating to the implementation of the policy and its impacts.

It is estimated that the Evaluation Framework and all data collection instruments will be completed and presented to the Telework working group by the end of August 2003 *at the latest*. Because the pilot is slated to begin on July 1st, a preliminary list of outcomes, indicators and measures has been drafted based on the telework policy documentation. This preliminary list has been developed to provide a **general** idea of what some of the

measures might be, but is by no means comprehensive. More specific evaluation questions and measures will be developed based on the interviews conducted for the Evaluation Framework.

Evaluation Activities

Once the Evaluation Framework and the data collection instruments have been approved by the Telework Working Group (or a sub-committee composed of its members), the initial data collection phase will begin and various activities will take place throughout the year. It is expected that the bulk of the study will rest on interview data, because of the low number of participants in the pilot. A short staff survey will also be conducted at the beginning and at the end of the pilot to collect comparative data on the impact of the policy on non-teleworkers. All of the data collected for this study will remain confidential at all times.

It is estimated that the bulk of the evaluation work will be done at the beginning and at the very end of the pilot, although some data collection activities will occur throughout the pilot period. A more specific schedule linking each evaluation activity to a timeframe will need to be provided within the Evaluation Framework.