

13. Telecommuting at UCSC: A Manager's Guide

- Policy Summary:** This document provides guidance to managers and supervisors who are considering establishing a telecommuting arrangement with an employee. Although there are no formal telecommuting policies or procedures at UCSC, a supervisor is not precluded from entering into a formal telecommuting arrangement with a staff employee, who will telecommute on a regularly scheduled basis. If you decide to establish an ongoing telecommuting arrangement with an employee, we recommend that you document such an agreement in writing. (However, it is unnecessary to formally document an occasional work-at-home arrangement.) A telecommuting arrangement is mutually agreed to between the supervisor and employee; an employee normally will not be required to telecommute.
- Definition:** Telecommuting is the relocation of an employee's work site either to her/his home or to another closer-to-home work site provided by the University. The term "telecommuting" normally involves the establishment of some type of computerized or electronic communication lines with the original on-campus work site. Telecommuting can be arranged on a part-time or full-time basis; the number of hours depends on factors, such as, the nature of the work to be done, the needs of the unit, and to the extent possible, the needs or preference of the employee.
- Intent of Telecommuting Arrangement:** Telecommuting is an assignment that a department may choose to make available to an employee when a mutually beneficial situation exists. Telecommuting is not an employee right or benefit but is an alternative work assignment mutually agreed to by the employee and the supervisor. The arrangement should be in the best interests of the University. It will normally benefit the department as well as the employee. It is recommended that there be preliminary agreement between the supervisor and the employee that the assignment can be terminated at any time, for any reason, by any of the parties involved.
- Evaluating the Proposed Telecommuting Arrangement:** In evaluating benefits to the department/university, the following factors may be considered:
1. Does the nature of the work lend itself to telecommuting?
 - The employee's job duties and responsibilities normally should not require more than fifty percent of his or her time being spent in face-to-face interaction with other members of the University community or clients of the department's services. Jobs that require physical presence to perform effectively are normally not suitable for telecommuting.
 - The employee's job duties and responsibilities should not require close supervision and the employee will not be responsible for providing close supervision of another employee's job duties and responsibilities.
 2. What potential costs and savings are expected?
 - The department may realize savings in office space. However, juggling shared space among several part-time employees may be difficult, especially if there is turnover.
 - Equipment costs may be saved at the office (as when existing equipment is made available for use by others). However, costs may be incurred at the alternate work site, depending on the nature of the agreement. For example, the department may need to buy, or support the costs of maintaining a computer, modem, fax machine or phone lines.
 - Staffing costs may be saved if the arrangement helps the department to recruit or retain a valued employee, or if the employee becomes more productive as a result of the new work arrangement.

Evaluating the Proposed Telecommuting Arrangement:

3. Is the employee a good candidate for telecommuting?
 - The employee will normally have attained career status. Telecommuting during the probationary period is not advised because of the need to clarify job responsibilities, establish relationships with coworkers and customers, and assess suitability for continued employment. The employee will normally have demonstrated a satisfactory and consistent level of work performance under the current supervisor for at least twelve months. (This is demonstrated typically by a recent performance evaluation rating of at least "met expectations/satisfactory" in all rating categories and a lack of disciplinary action(s) for the preceding two years.)
 - During the approved hours of work the employee will be telecommuting, the employee will not be the primary caregiver of any children, adults or elders.

Equipment:

The University may provide equipment, software, data, supplies and/or furniture for use during the telecommuting assignment. Such provisions will be made based on the employee's telecommuting proposal and within the resource limitations of the department. All such items remain the property of the University and will be returned to the University should the telecommuting assignment be terminated.

Formalizing a Request for a Telecommuting Arrangement:

An employee who meets the criteria submits to the supervisor a written proposal to establish a telecommuting arrangement. To take effect, the proposal is approved by the employee's designated supervisor and is subject to the review and approval of the department head. The telecommuting proposal will normally include the following:

- *Expected Benefits.* The employee describes how the department as well as the employee will benefit from the proposed telecommuting arrangement.
- *Work Content.* The employee describes the tasks that s/he will assume at the telecommuting site and how completion of these tasks will be monitored and evaluated.
- *Proposed Schedule.* This section states the proposed day(s) of the week for telecommuting, work hours for those days, and beginning and end date of the telecommuting arrangement.
- *Workplace Communication.* The employee describes how s/he proposes to maintain contact with the supervisor (and the department, if necessary) while telecommuting.
- *Workspace and Equipment.* This section describes the designated workspace that constitutes the employee's home office. It lists the equipment, software, and data, supplies and/or furniture that would be needed when telecommuting. It also identifies those items supplied by the employee and those items proposed to be provided by the department.

Submission of a written proposal does not imply approval of a telecommuting arrangement. The employee's supervisor, in consultation with the department head, if warranted, will normally approve the terms and conditions of the agreement. In addition to the above, the formal agreement will normally include the following:

- A statement that the employee agrees to provide a secure location for University-owned equipment and materials, and will not use, or allow others to use, such equipment for purposes other than University business; and that the University is entitled to reasonable access to its equipment and materials.
- A statement that management retains the right to modify the agreement on a temporary basis as a result of business necessity (e.g., the employee may be required to come to campus on a day that would otherwise be scheduled for telecommuting).

Formalizing a Request for a Telecommuting Arrangement:

- A statement that the arrangement is voluntary, and may be terminated at any time by either party, with specified notice.
- The agreement will normally be in writing and be signed and dated by the employee, and supervisor, and the department head, as appropriate. A copy is given to the employee; the original is kept in the employee's department file.

Resources:

In establishing telecommuting arrangements, campus departments can apply the information above to develop a formal written agreement. Refer to a Sample UCSC Telecommuting Agreement, p. C20-1 for a model. Questions regarding telecommuting arrangements may be directed to your Human Resources Service Center representative.