Government Without Walls
Tools for Managers

Glossary of Terms

Government Without Walls	**A government that provides flexibility in employee work schedules and locations to reduce costs, maintain or improve customer service, increase employee productivity and retention and reduce the carbon footprint.**
Appointing Authority	**The head of a department, office, board or commission who has the power by law or the lawfully delegated authority to make appointments to or remove persons from County service.**
Teleworker	**An employee who performs officially assigned duties at home or at other worksites while utilizing various forms of telecommunications technology for a significant portion of his or her work. This can include communication with managers, colleagues and the public.**
Mobile Worker	**An employee who spends nearly all (or 100%) of his or her work day in the field. Various technologies may be used to access and transmit information to a central office.**
Alternative Work Schedule	**When an employee works outside the normal five days a week, eight hours a day work schedule.**
Hoteling	**When an employee temporarily uses a County workspace not his or her own.**
4/10 Work Schedule	**Employee works four days during each work week; employee works 10 hours per scheduled day.**
9/80 Work Schedule	**Employee works five days during one work week with four days at 9 hours and one day at 8 hours (totals 44 hours), and four days during the other work week with four days at 9 hours per day (totals 36 hours).**

Frequently Asked Questions

General Questions

1. What is GWOW and why are we pursuing it?
2. What are some examples of GWOW in action?
3. Aren't County employees already working in the field, at alternative locations or working schedules outside the traditional Monday through Friday, 8-5 schedule?

For Managers

1. Is GWOW an employee benefit?
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11. How can I ensure that confidential information is protected?
12. How do I know if GWOW is successful?
13. How do I know employees are really working when I can't see them?
14. My management style is spontaneous, why should I change anything when I prefer to have staff here when I need them?
15. How do I ensure that employees in my unit stay connected, engaged and motivated if they don't come into the office?
16. How do I know that employees have a suitable and safe place to work away from the office?

General Questions

Q: What is GWOW and why are we pursuing it?

A: Government Without Walls (GWOW) is a tool that helps both management and employees look for ways to provide services more efficiently or effectively by changing where and when we work. It

may take the form of employees working at alternative locations, working in the field, or working an alternative schedule either some or all of the time.

The County is pursuing GWOW for several reasons:

- Advances in mobile technology have made it possible for employees to access information, manage files and complete transactions in the field – which makes it possible for County managers and employees to work in ways they never could before.
- With continuing budget pressures challenging our ability to provide services, the County must explore all opportunities to improve efficiency and productivity.
- Both the public and private sector are embracing tools that allow work to be performed "anywhere, anytime." As this becomes an increasingly-accepted business practice, the County will have to adapt as well, to attract and retain employees now and into the future.
- Creating a County workforce capable of working from remote locations will make the County better prepared to continue delivering services if an emergency requires staff to perform duties at alternative sites.

Q: What are some examples of GWOW in action?

A: GWOW options include, but are not limited to:

- Mobile Workers: Employees who work in the field or community, without an assigned workplace. This includes employees who work in the field part time and who share a workspace in their office or workplace with other employees.
- "Hoteling" or "Hot Desking": Employees who work in the field and share workspaces when needed at whatever County location is most convenient (similar to the idea of a hotel room that is used when needed.)
- Teleworkers: Employees who use their home as an alternative work space, either full or part-time.
- Alternative Work Schedules: Employees who work alternative schedules, outside of the traditional Monday through Friday 8:00 am to 5:00 pm work day, to improve performance or meet business needs.

Q: Aren't County employees already working in the field, at alternative locations or working schedules outside the traditional Monday through Friday, 8-5 schedule?

A: Yes, some employees do already work 4/10 or 9/80 schedules, work at alternative locations or share workspaces. The fact that the County operates 24-hour facilities and manages a diverse array of program means that some employees have always worked schedules and at locations that best meet the needs of their department's business.

However, with mobile technology making it possible to work in new ways and new places, more employees will find ways to use that flexibility to work more efficiently. GWOW ensures that the County is ready to support employees and managers as they adapt to new, more productive ways of doing business. Our tools and policies are up-to-date and in place.

For Managers

Q: Is GWOW an employee benefit?

A: No, but some employees may see it that way. Employees who want to telework, work remotely or work an alternative schedule may be given the opportunity if: their duties can be completed off-site or outside of regular business hours, they have work habits and behaviors that lend themselves to GWOW, and there is a clear way to measure the work the employee completes. To be approved for telework, employees must also have a suitable alternative location (at home or another location) in which to work. Please refer to Telework Policy. However, even when employees meet all of the requirements, the only person who can decide whether GWOW participation would be appropriate is the appointing authority.

Q: Will all employees want to participate in GWOW?

A: No. Some employees will realize that their job requires them to be at a certain workplace or to work certain hours, which means that alternative work schedules and locations just aren't right for them. Others prefer to come into the workplace where they can collaborate with others.

Studies do show that the percentage of employees who want to telework will probably increase over time. Some of the factors that could fuel an increased interest in telework, mobile remote work and alternative work schedules include rising transportation costs, longer commutes and the increasing availability of technology which makes it easier to work remotely.

Q: Can employees be required to telework?

A: Decisions regarding teleworking assignments will be made on a case-by-case basis by the employee's appointing authority in consultation with department management, department human resources staff, group executives, the Department of Human Resources (DHR) and any affected labor groups as deemed appropriate. Decisions will be made based on job duties, employee suitability for teleworking and department business needs.

Q: How do I select employees for GWOW participation?

A: The GWOW website http://cwss/sites/DHR/gwow/default.aspx includes a checklist to determine whether GWOW is appropriate for a given individual, position, program or department.

In most cases, the decision to allow GWOW participation is made by the designated manager or supervisor after determining an employee's suitability.

Employees who are good candidates for GWOW are self-motivated and self-disciplined, have a track record of success, are able to set goals and achieve them, and work proactively to keep the lines of communication open with their manager and team members.

Q: What kinds of jobs are suitable for GWOW?

A: Instead of thinking of jobs, think of the collection of tasks that make up a job. Some tasks can only be done at the worksite and/or during regular business hours, such as, those that require face-to-face meetings, specialized equipment, or involve material that is too confidential to move off site. However, other tasks can be done just as well, if not better, away from the office or outside regular business hours, such as reading, writing, data entry, some phone calls, design work, etc. In fact, some employees report that tasks that require a lot of concentration, like writing, are better accomplished away from the office where there are fewer distractions. GWOW participation should be largely determined by the tasks that can be done away from the office or outside regular business hours. The decision to GWOW or not to GWOW should not be based upon on job titles alone.

Q: Can both hourly and salaried employees participate in GWOW?

A: Yes. Both hourly and salaried employees can work alternative schedules and/or at alternative locations if it makes business sense and relevant issues are addressed.

Regarding hourly, non-exempt employees, managers are encouraged to consult with County Counsel and Labor Relations before approving GWOW arrangements, to identify whether the affected staff are exempt or non-exempt from FLSA considerations and how that may or may not impact their unit's work operation. For example, hourly employees who are approved to telework or to work at a satellite location may be eligible to receive compensation for their time and mileage if they are required to travel to a location other than their primary work site during their approved work schedule.

For salaried (or unclassified) employees, appointing authorities may approve alternative work schedules or locations as long as 1.) the unit has sufficient coverage in the workplace for business to continue during the unit's established hours of operation and 2.) the arrangement helps the employee and unit meet performance goals. For example, if it makes business sense for a salaried employee to work four 10-hour days per week and their absence from the workplace on the fifth day does not negatively impact operations, they may be assigned or approved to work a 4/10 schedule. Unclassified employees who are assigned or approved for this type of schedule and who maintain it may consult with payroll staff for instruction on how to report their time.

In either case, care should be taken when scheduling on-site meetings and trainings with any employees who work alternative schedules or at alternative locations, to avoid unnecessary expense or commute time. In some cases, web-based meetings or teleconferencing may be viable alternatives to in-person activities. And, of course, managers may prefer to select one day for meetings and have all staff work in the office that day.

Information on how other employers and managers successfully address these challenges is becoming increasingly available as more employers use new technology tools to increase workplace flexibility. Check out the "Additional Resources" on the County GWOW webpage (http://cwss/sites/DHR/gwow/default.aspx) for articles like "Top Ten Strategies for Managers of Mobile Workers" and the "Unmasking GWOW" Training in the County LMS.

Q: Which employee expenses will be reimbursed?

A: Employee expenses may be reimbursed as appropriate in accordance with existing County and department policies. Managers and supervisors who plan to implement GWOW should have a plan in place for how expenses will be reimbursed prior to launching any GWOW effort. This plan should be communicated to employees so that expectations are clear.

Q: Can managers participate in GWOW?

A: Managers should be considered for telework just like any other employee. Participation will be evaluated based on individual department and/or program needs and will be implemented at the discretion of the manager's appointing authority. Considerations include the employee's tasks and abilities, how he or she will communicate and solve problems when away from the office and whether he or she meets the County criteria for GWOW. To be considered, managers should provide a plan showing how they will do this.

Managing remotely may be more successful for managers who primarily use electronic communication tools when communicating with their employees. By doing this, managers can ensure open lines of communication whether employees are present at the worksite or at home, and similarly, if the manager is on site or at home. Prior to teleworking, managers should consider which tasks require their presence on site.

Q: Will the County provide all necessary equipment to participate in GWOW (i.e., computer, internet connection, etc…)?

A: The County is committed to providing employees with the tools they need to complete their work. The provision of specific equipment is the sole discretion of each department and appointing authority. Managers and supervisors who plan to implement GWOW should have a plan in place showing how they will provide the necessary equipment before launching any GWOW effort. This plan should be communicated to employees so that expectations are clear.

Q: What if a teleworker is injured when working at home?

A: Should a teleworker become injured while working at home, the County's existing process for addressing worker's compensation should be followed. More information is available at: http://cwss/sites/DHR/rm/Lists/Workers%20Compensation/AllItems.aspx.

Q: How can I ensure that confidential information is protected?

A: Information may have different levels of sensitivity and require different levels of protection. Some information may be so sensitive that it is unsuitable for telework or mobile-remote work.

In other cases, it may be permissible for GWOW participants to work with the sensitive information outside the office provided there are security precautions in place, such as encrypted computers and secure network connections. Please refer to CAO Admin Manual 0040-09-02 County Data/ Information – Classification, Protection Level, and Proper Security and any additional policies your Department or Group has implemented on information security. Part of good security is training. Employees need to be aware of the responsibility they have when taking information off site or accessing information from a remote location.

Q: How do I know if GWOW is successful?

A: Here are some key questions to determine whether your GWOW program is successful:

1. Are established performance goals met?
2. Is the quality of work standard or above?
3. Are customer needs being met?
4. Are problems occurring because workers aren't in the office?
5. What are employees saying? Is performance improving? Is morale improving? Are employees experiencing positive benefits such as reduced commute time?
6. Are workspace costs decreasing? Do you have a positive return on investment?
7. What are managers saying? If managers feel GWOW isn't working, is it because the work isn't getting done, or are they feeling insecure about managing remotely?
8. If there are problems, are they because of employee performance or because the employee doesn't have the equipment or support they need to do the job right?

Managers should have an open and inquiring mind and monitor the program closely. Ask questions and communicate frequently with employees and managers. In general, you will know if GWOW is successful by examining performance outcomes. Are workers more efficient and productive? Are customers being served better? You should also look at cost savings where applicable. The GWOW website includes some helpful guidance on costs/benefit assessments.

Q: How do I know employees are really working when I can't see them?

A: The simple answer is, monitor their performance results to ensure the work is done. Most employees will respond very well to this. Others may need more defined performance measures, work logs or other tools, as well as occasional check-ins, audits and quality control checks to monitor progress.

The real measure of whether or not employees are working is the quantity and quality of work they produce. It is more important to see the work results than to see the worker.

All managers should establish clear expectations for employee performance by talking with the employee and reaching agreement on what the home, remote, or mobile assignments are. The details of such agreements depend upon the individual employee and his/her job, the amount of time he or she works away from the office or outside regular business hours, and the manager's own comfort level with the employee.

Q: My management style is spontaneous, why should I change anything when I prefer to have staff here when I need them?

A: We all have our own individual personalities and work styles. However, management decisions must be based on what makes the most business sense for the unit or program. If having staff work off site, or on an alternative schedule makes the County more efficient, improves service or cuts costs, managers and employees should find ways to make these new arrangements happen. That may mean adapting to a new way of working. If so, it will definitely mean identifying ways to ensure regular, effective communication with staff.

Fortunately, many tools are available to help both employees and managers stay connected, from email and phone calls to webcams and software programs that allow us to communicate remotely. What's important is that both managers and employees get the information they need to do their jobs and to remain engaged.

Q: How do I ensure that employees in my unit stay connected, engaged and motivated if they don't come into the office?

A: Anyone who manages mobile workers must have a plan in place for how they will communicate with these workers. Since spontaneous hallway conversations won't occur, managers should identify what kinds of information employees will need to do their jobs and to feel connected to the unit and then plan when and how they will send that information. It is the manager's responsibility to ensure that employees get the information they need, no matter what communication tools are used, whether it's email, conference calls, web postings or online meetings.

Q: How do I know that employees have a suitable and safe place to work away from the office?

A: This is the employee's responsibility. The GWOW website includes home office guidelines for teleworking employees. Employees must meet the minimum requirements. Failure to do so could

result in disqualification for telework. Minimum requirements for mobile workers are also addressed in the GWOW policy.

Financial Analysis Tool for Managers

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Introduction

The County seeks to deliver services to the public in the most efficient, effective and productive manner possible through leveraging our Government without Walls (GWOW) initiative. The GWOW initiative was designed to give County staff and managers a set of tools and resources to identify alternative work schedule and location options, to evaluate whether alternative work schedules or locations would benefit department business needs and, if so, to guide them in implementation. Some potential benefits of implementing GWOW may include:

- reduced vehicle fuel and maintenance costs,
- reduced facilities costs,
- increased staff mobility,
- increased efficiency and productivity, and
- increased customer satisfaction.

County programs can maximize efficiency and productivity while minimizing costs by utilizing alternative work schedules; strategic vehicle assignments, locations and pools; alternative staff work location assignments; and increased mobility of information technology (IT) among other tools. Each program/unit should be evaluated on a case-by-case basis to determine whether nontraditional work schedules, environments and/or equipment would facilitate an increase in productivity and/or decrease in cost.

How to Use This Guide

The purpose of this document is to outline general guidelines and procedures to assist County managers in evaluating GWOW, specifically alternative work schedules, work locations, and mobile IT, to determine if programs they manage can be provided more efficiently, economically, or with improved quality and service levels. This guide provides the basic framework by which managers can evaluate the cost and benefits between existing and proposed changes to work schedules and/or locations.

When evaluating a program/unit for GWOW implementation, management should work closely with department finance/budget staff to review this guide and prepare a cost/benefit analysis. Once the cost benefit analysis has been completed, departments should work with their General Manager/DCAO finance and human resources staff to review the assumptions and expectations prior to executing the GWOW program. Departments should also discuss changes to work schedules and/or locations with department personnel in advance of implementation.

Financial Analysis Overview (Step-by-Step)

Step 1: Select a Program/Function/Activity for Potential GWOW Implementation and Identify Performance Levels

The initial step is to identify the program, function or activity that will be evaluated for GWOW implementation. This may be one position, a portion of a division, an entire division, an entire department or a combination of one or more programs in one or more departments. Once the program/function/activity has been identified, select performance levels related to the function/activity. Specifically, the data gathered for each function/activity (e.g., number of permits issued, number of meals provided, number of vehicles serviced, etc.) should reflect the measurable output of the function/activity being analyzed. Performance measures used to identify the efficiency of GWOW initiatives must be identified and reviewed by the GWOW Metrics Committee in advance implementation. Reporting of GWOW performance measures post implementation will be required. See the GWOW METRICS GUIDELINES for additional information.

The "Step 1 - Potential Alternative Work Arrangements" section of the Resources for Financial Analysis portion of this document includes information about various forms of GWOW that could be implemented.

Step 2: Identify Costs

The next step is to quantify the current and proposed costs of providing the service, such as: facilities costs (square footage, utilities, janitorial, gardening and/or maintenance contract costs); vehicle costs (mileage reimbursement, County vehicle fuel and maintenance costs, parking costs); equipment costs (computer/laptop, phone, desk, chair); non-productive travel time to and from a work area other than the employee's headquarters; ongoing communication costs (LAN line, Wi-Fi, phone line, cell phone).

The "Step 2 - Cost Factors and Calculating Savings" section of the Resources for Financial Analysis portion of this document is intended to help departments identify costs for the current and proposed program. Please note this section is intended as general guidance. Not all items will apply equally to all programs/functions/activities. Consult with your department finance/budget staff for clarification.

Step 3: Determine Avoidable and Unavoidable Costs

Once all the relevant costs are identified, they should be classified as either "avoidable" or "unavoidable." Costs such as miles driven or reduction in staff years are easily identified as avoidable: if the work is not being done, the vehicle will not be driven, or staff will not be hired. Some costs are unavoidable and must be carefully taken into account in this analysis. For example, facility cost savings will not be realized if a program or department is committed to a long-term lease and cannot move or reduced space. In this case, the cost of the long term lease should be classified as "unavoidable." Other unavoidable costs may include Countywide overhead, department overhead and/or division overhead.

To achieve savings or greater efficiency from such unavoidable costs, managers must increase resource utilization, in the case of the leased space, perhaps a portion could be rented out to another department. Analyzing avoidable and unavoidable costs ensures that a decision to implement alternative hours/locations does not increase overall cost. Unavoidable costs should either not be included in the

calculation of either current costs or proposed costs, or be included in both calculations. Each program may have a unique set of costs and should therefore be evaluated independently.

Step 4: Estimate the Measurable Output for the Current vs. the Proposed Program.

The measurable output may be different in the proposed GWOW program, as efficiencies may increase the volume of services provided. For example, an inspector who starts his day in the Kearny Mesa office and drives to Chula Vista in a County car to complete his inspections and then drives back to Kearny Mesa at the end of the shift to return the vehicle may complete fewer inspections daily than an inspector whose headquarters and County vehicle are located in Chula Vista. The second inspector starts her day in the geographical area nearest to where the inspections are needed; therefore more inspections can be performed during the time that would have been spent traveling.

Step 5: Calculate the Average Cost per Service Provided

Divide the total ongoing cost of providing the service by the volume of services provided (similar to the process used in fee development). For instance, the total cost of operating a division road station for the Department of Public Works could be divided by the miles of pavement for a period of time to get the cost per mile of pavement.

Don't include one-time start up costs such as equipment or vehicle purchases in with ongoing costs, as these artificially increase costs in the first year. These costs should be used to determine Return on Investment (ROI) in Step 6.

Step 6: Determine Return on Investment (ROI)

Significant start-up costs or capital costs that derive benefits over a period of time need to be addressed through a ROI analysis. For example, if an initial investment in equipment, such as laptop computers or cell phones, drives up the cost of a proposed alternative but only in the first year, it should be amortized (spread) over a longer period of time to determine whether cost savings or efficiencies beyond year one make the proposal less costly over time.

Other one-time cost factors for determining ROI include: program planning and development costs, such as labor for project planning team, legal or consultant fees, training, development and implementation, materials preparation; initial IT set up including staff time, changes to network and security, hardware and/or software purchases and phone/cell phone costs; and furniture or other costs.

ROI can be calculated to compare one-time investment costs and returns over time by taking the total investment cost divided by the annual savings. For example, if the above-mentioned equipment purchase of laptops will cost $100,000 but will yield annual efficiency savings of $50,000 (one staff year), the investment will be paid off within two years ($100,000/$50,000 = 2 years). After that the efficiency savings is net savings. A shorter payback period means the program can realize savings sooner. When calculating ROI, it is important to clearly identify savings as either cost avoidance or true budgetary cost savings.

How would you calculate ROI if there were no start-up costs or savings? Suppose current costs are $1,000,000 and proposed costs are $1,100,000 – a ten percent increase? In this case you would look at the cost per unit produced (miles of road paved, cost per inspection, etc.) If costs increased 10% but production increased 20%, you achieved return on your investment. In this case, with no one-time costs, your return on investment starts immediately in Year 1. In another example, if costs increased 20%, but production only increased 10%, you would not achieve a return on your investment as your net cost per production unit would go up.

Resources for Financial Analysis

Step 1 - Potential Alternative Work Arrangements

In the last decade, technology has dramatically reshaped the options the County has for service delivery. With the focus on results, there is more freedom to change our process to improve efficiency and/or reduce costs. Following are brief descriptions of various forms that a GWOW initiative can take.

Alternative Schedule

One of the GWOW tools available to managers is the use of alternative schedules. Currently, County appointing authorities have the option of changing the normal work schedule of Monday through Friday (8-hour days) to a four-day, 10-hour per day schedule (referred to as a 4/10 schedule). Other schedules such as a 9/80 (eight 9-hour days and one 8-hour day per pay period) may be available to staff. There is also the ability to use other flexible schedules that meet both the needs of the department, its customers and its workers. If there is no business reason that the worker must work a set schedule, and the worker produces results using an alternative schedule, it should be considered. This option could increase efficiency and productivity, as well as increase employee satisfaction (think reduced absenteeism and increased retention) and customer service.

The Department of Public Works (DPW) Road Division is a real-life example of the use of a 4/10 schedule to increase efficiency, reduce costs and retain happy staff. The Division had been working five 8-hour days, beginning by loading up the equipment in the road station, traveling to the job site, setting up the equipment, performing work, bringing additional materials out to the job site as needed, etc. This had to be done five times a week, as well as the reverse of the process at the end of the day. With the change to a four-day week, DPW achieved a 20% decrease in the time it spent loading up, traveling to and setting up the job site, and additional time spent performing work each day. What phenomenal savings! And the employees are very happy with the new schedule as well.

Hoteling

Another GWOW tool is hoteling. Hoteling means that the worker can use a workspace in another facility if it makes sense to do so. For example, Environmental Health Specialists conduct inspections at facilities all over the County. They have four offices: Downtown, Kearny Mesa, East County, and North County. If an inspector is responsible for working in Ramona or Julian, it would not be efficient for the inspector to drive to Kearny Mesa to pick up or drop off County mail and supplies or to sit in an assigned cubicle to

write reports, participate in webinars or conference calls, etc. This worker could stop in available locations closer to the inspection sites, such as the Ramona Library or in Dos Picos Park to take advantage of the Wi-Fi, LAN drops, mail drops and other facilities. County facilities do not utilize 100% of assigned workspaces 100% of the time. By offering hoteling space, we can reduce the need for that DEH worker to have a dedicated cubicle in the DEH offices and increase the utilization of the workspace in either the library or the park. Hoteling can also take place in public-private partnerships. For example, some Health and Human Services Agency employees are out stationed at hospitals, where the customers who need their services are located.

Mobile Worker

Mobile technology has improved tremendously in the last decade. New products such as laptops, tablets, notepads, handheld wireless devices such as Blackberries, cell phones and other mobile IT equipment provide an opportunity for staff to spend virtually 100% of their work day in the field where their work is performed (inspections, repairs, interviews, etc.) New technology allows staff to access and transmit information regarding program-related activities electronically through the use of mobile equipment. Mobile workers, who receive work assignments and complete tasks independently in the field, need to come into the office infrequently. Just as DPW experienced with the four-day work week, mobile workers in the Department of Agriculture, Weights and Measures experienced a huge reduction in transit time from the main office to the field in the morning and the return trip each day by assigning the staff and vehicles to locations within the geographic area that they serve. Departments can locate County vehicles within the workers' districts so that they start each day in their vehicle and simply drive to their first assignment. Departments can save by reducing cubicle space in the offices, as well as LAN lines, desk phones and furnishings.

Teleworking

Another option is to allow workers to work from home or another offsite location. This alternative offers many benefits to both the employee and the employer. The employee saves on vehicle-related expenses and time by eliminating the morning and evening commute. Both of these factors contribute to increased employee satisfaction, decreased absenteeism and increased retention. Society as a whole benefits from reduced traffic congestion, increased parking availability and reduced carbon footprint. Employers benefit from increased efficiencies achieved when the worker is able to work without interruption by other employees.

Steps 2 -5 - Cost Factors and Calculating Savings

The following list of cost factors are just a few of the many costs that can be evaluated for possible savings. As mentioned previously, some are cost avoidance, some allow a shift of resources and some represent actual budgetary savings. As you go through the examples, try to identify ways that your organization/department could document and demonstrate the true benefits of GWOW to your program in terms of these cost factors.

Absenteeism

When employees miss time at work, it costs the County in many ways: productivity (the employee is being paid but not producing work), efficiency (other workers may be pulled off their normal duties to cover) and customer satisfaction (as the services customers expect from the County are delayed.) The table below can help in estimating savings from reduced absenteeism.

Savings from Reduced Absenteeism (including use of sick leave, doctor's visits and other appointments)			
Calculation: The example below uses data from the first full year of GWOW. You could use the first six months and multiply by 2 to annualize. You will need an estimate of the average employee salary and average number of work days.			
		Example	**Your Dept/Div/Program**
# of days absent by all GWOW employees during the year	A	220.0	
Divide A by total number of GWOWers for the average # of days	B	5.5	
# of days absent by all non-GWOW employees during the year	C	820.0	
Divide C by total number of non GWOWers	D	7.5	
Is the average of GWOWers (B) less than the non-GWOWers (D)?	E	yes	
If yes, then subtract B from D to get the average days saved by GWOW	F	2.0	
Average daily Salary per Employee (annual salary-benefit/219 days)	G	$228.31	
Total **savings** from reduced absenteeism (F x G)	H	$456.62	

Notes: Sick leave may be reduced because employees who are too sick to come into the office but not too sick to work part of the day may do so if they can work from home. And, by staying home, they are not exposing others to communicable diseases such as the cold or flu.

Efficiency

Poor efficiency costs the County in lost time, money, opportunity and public trust. It is incumbent upon County managers to develop efficiency measures, monitor them and constantly strive to improve efficiency. Hours saved in a process could mean a redirection of resources to other activities where they are needed, or they could result in actual savings from reduced overtime or reduced staffing needs.

Experts agree that alternative work arrangements do improve productivity and quality of work. County GWOW pilot efforts have demonstrated that employees can accomplish more at home, where there are fewer distractions, or out in the field where their customers are and where the work is performed. GWOW is a results-based program and efficiency is one of the best measures of success.

Set-up time: If there is an ongoing requirement to set up a workspace or job site every day before work can be done, there is an opportunity to reduce this amount of time. As was discussed previously, going from a traditional five-day work week to a 4/10 week can reduce set up (and dismantle) time for the workspace by 20%.

Travel Time: It has been demonstrated that organizations can reduce unproductive travel time by 20% through schedule change to 4/10 or by 100% through alternative work locations such as hoteling,

teleworking or mobile workers. This savings must be translated into terms of efficiency and/or productivity. If staff are able to work in the field 20% more

The table below can assist in estimating savings that may result from improved efficiency and productivity through GWOW implementation.

Savings from Increased Efficiency and Productivity				
			Proposed	**Actual**
		Example	**Your Dept/ Program/Div**	**Your Dept/ Program/Div**
Estimated productivity increase	A	10%		
Average employee salary	B	$50,000		
Multiply A x B	C	$5,000		
Enter the number of GWOWers	D	40		
Value of Increased Productivity C x D	E	$200,000		

Note: Articles found on the internet about surveys and pilot studies from major organizations and public agencies report increases in efficiency/productivity from 10% to 30%. This example uses 10% to be conservative. Your department/organization may anticipate a higher or lower % of change. Be sure to monitor your results and fill in the Actual column after a period of time to verify the increased efficiency/productivity.

Examples of efficiency measures:	**Prior Measure**	**Revised Measure**	**Change**
Reduction in inspection time (divide revised measure by prior measure and subtract 1)	60 minutes	50 minutes	-16.67%
Increased Inspections completed per month	200	250	25.00%
Miles of road paved per month	150	195	30.00%

Facilities/Office Space/Furnishings

Any alternative that takes the worker out of the workspace has a potential for savings associated with facilities (i.e., office space.) Teleworkers who work halftime in the office and half time at home could share one workspace by staggering their office time. This scenario could yield a reduction in total square footage needed (as well as utilities and parking.)

Savings on office space and related costs may be achieved if a number of employees telework on varying days. The graphic below provides four scenarios, each for an organization with 150 employees where 110 (73%) do not telework and 40 (27%) do. After reviewing these scenarios, you may want to develop a similar table for your department/program/unit to estimate savings from GWOW implementation.

In the first scenario below, 20 employees telework one day a week and 20 telework two days a week. No matter how the schedules are arranged, there will always be at least two days a week when space is needed for all 150 employees.

Staffing	M	T	W	TH	F
110 in office each day					
20 telework 1 day					
20 telework 2 days					

In the second scenario, all teleworkers work two days a week from home; there is still one day a week when space is needed for everyone.

Staffing	M	T	W	TH	F
110 in office each day					
20 telework 2 days					
20 telework 2 days					

The third scenario does free up space, but it requires that a large number of workers telework three days a week.

Staffing	M	T	W	TH	F
110 in office each day					
20 telework 3 days					
20 telework 3 days					

The fourth scenario frees up a minimum of seven worker spaces every day, assuming schedules could be arranged accordingly. This graphic points out the obvious fact that the more teleworkers you have doing a majority of their work at home, the greater the chance of freeing up office space. So while an organization may start small, there is a real incentive to ramp up so that a significant amount of work is home-based. This emphasizes the need for good telework managers and technology that allows workers to do any work at home they could do in the office.

Staffing	M	T	W	TH	F
110 in office each day					
18 telework 1 day					
15 telework 2 days					
5 telework 3 days					
2 telework 4 days					

The General Services Administration (GSA) uses 230 square feet (sf.) per employee when planning office space for government offices. The rule-of-thumb calculator on Officefinder.com estimates 220 sf. per employee for an organization of 150 employees. These estimates include a mix of office sizes, cubicle spaces and open work spaces, plus hallways, break rooms, conference rooms, etc. This information is provided for demonstrative purposes only. Specific detail on County Space Standards can be located in CAO Admin Manual Policy 0050-01-6, CAPITAL, SPACE AND MAINTENANCE REQUESTS.

In the fourth scenario, the organization may not give up the conference room, executive offices or break room, so realistically, the space saved could be much less than 220 sf. However, using an estimate of even 100 sf. per employee, the organization could reduce usage by 700 sf. Using a gross lease rate of $22/sf., the organization could save over $15,000 a year.

To realize a benefit from reduced office space, the organization will have to set up shared workspace, so that not all of the space for the seven workers is necessary. Some will have to be converted to shared offices, which is one reason for the smaller 100 sf. figure. Shared office space could also be implemented using hoteling and mobile workers, which often changes the emphasis from the central office being the main worksite to the home being the main worksite. All three alternative work arrangements require the staff to visit the office only when needed there.

Utilities: Alternative schedules could affect utility costs positively or negatively, depending on the solution selected. For example, extended hours could require lights, heating/cooling and equipment for longer periods than traditional schedules; however, a four-day week could eliminate the need to light and/or heat a building completely one day a week. Teleworking, hoteling and mobile workers can reduce utility costs to some degree; however, unless the major cost of lighting and cooling/heating a facility could be avoided, the savings from utilities is marginal.

Parking:

Implementing a program of teleworking, hoteling and mobile workers could mean fewer parking spaces for employees required at County facilities. According to County General Services, the one-time cost of real estate and construction to create a parking spot Downtown is approximately $25,000. Other locations in the County cost an average of $10,000.

Ongoing parking costs can also add up. According to the National Parking Association, in 2009 the average monthly parking rates were $151 for an unreserved and $211 for a reserved space. If your department or division pays for parking or transit on behalf of staff, you may be able to realize some savings by telecommuting, hoteling or placing the County vehicle in a location within the vicinity of where the work is actually performed. The following table can be useful to help estimate the existing costs associated with parking that may be reduced by implementing GWOW.

Savings from Reduced Parking and Transit Passes			
	Monthly fee	**# of Staff Parking or Transit Spots Reduced**	**Savings**
Parking			
Transit Pass			
Other:			
		Total Parking and Transit Cost Reduction	

IT Equipment:

Laptops, tablets, notebooks, and other mobile electronic devices allow staff to leave the traditional office workspaces and take the tools they need with them into the field where their customers need them. Air cards, VPNs, NetMotion, portable printers and scanners allow staff to work in the field virtually all the time. An investment in IT equipment could mean cost avoidance over the long-term as well as increases in efficiency and revenue with a quick return on investment.

Cell phones

Mobile technology has made cell phones and handheld wireless devices such as Blackberries a combined voice and email communication system. With GWOW implementation, it is important to consider whether an employee with a cell phone, still needs a desk phone? If the answer is yes, could one desk phone service many employees?

Desk phones

A cost benefit and efficiency analysis should be done to study the efficacy of maintaining desk phones for individual staff. Cell phones allow staff greater mobility to complete their work.

Use the calculation below to help determine the most cost efficient mix of ongoing IT costs for your program. Be sure to also complete a calculation of efficiency when comparing IT alternatives.

	Current Quantity	Proposed Quantity	Monthly Cost Per Unit	Total Current Monthly Costs	Proposed Monthly Costs	Savings
Cell Phones			$ -	$ -	$ -	$ -
PC			$ 92.35	$ -	$ -	$ -
End User Data Jack			$ 85.26	$ -	$ -	$ -
Voicemail			$ 3.52	$ -	$ -	$ -
Voice Jack			$ 47.23	$ -	$ -	$ -
Laptop			$ 137.46	$ -	$ -	$ -
Tablet			$ 162.34	$ -	$ -	$ -

VPN			$ 11.73	$ -	$ -	$ -
Verizon Wireless			$ 45.01	$ -	$ -	$ -
Totals				$ -	$ -	$ -

The monthly costs listed above are for FY 10-11. Be sure to check with your department IT coordinator and the County's IT contract for the current rates when completing this analysis.

Overtime:

Managers must complete a cost analysis when deciding whether to use overtime on an ongoing basis. Increased efficiencies may reduce the need for overtime and achieve substantial savings. Alternative schedules may also reduce the need for overtime.

Retention:

Losing employees is costly to any organization. The average cost to recruit, hire and train a new employee can be as much as 25% of his/her salary. By offering alternative work arrangements (schedules and work locations), the County can assist employees in balancing their work and home lives which can improve morale and support retention of experienced and valuable staff. As an example, an employee may have his/her home situation change (such as when a spouse takes a new job) in a way that results in a much longer commute, prompting the employee to seek new employment, unless he/she can telework instead. Surveys indicate that employees with optional work arrangements are less likely to say they have thoughts of leaving the organization.

The table below can assist in estimating savings from increased retention.

Savings from Increased Retention

To calculate the savings from retention, you will need data collected over two time periods. This example uses one year of data prior to the change to an alternative work arrangement, and one year of data after the change. You may want to exclude those who left the organization because of retirement at full retirement age or other reasons not related to GWOW implementation.

		Example *	Your Dept/Div/ Program
# employees who left during the year prior to GWOW	A	21	
# people employed during the year prior to GWOW	B	140	
Divide A by B = % of staff who left year prior to GWOW	C	15%	
# of employees who left during the first full year of GWOW	D	18	
# of people employed during full year of GWOW	E	150	
Divide D by E = % of staff who left during first year of GWOW	F	12%	
Is the percentage that left the organization during the GWOW year smaller than the year prior to GWOW? If not, then the first year of GWOW has not had an effect on retention. If F is smaller than C, continue.		Yes	
Subtract F from C = increased retention rate	G	3%	
Multiply G by E to get an estimate of the number of employees retained for the year	H	4.5	
Estimate the per-employee cost of recruitment: recruitment process, advertising, screening, interviewing, training, lost productivity during the learning curve, relocation costs, payments to professional recruiters, costs of employee who left. (10% is conservative)	I	10% of salary	
Multiply (I) by the current average employee salary	J	$ 7,500	
Total Estimated Annual Savings = (J) x (H)	K	$ 33,750	

** The organization in the example had 140 employees in the year prior to GWOW and 150 in the first full year of GWOW. The average annual employee salary is $50,000.*

Note: You will need to recalculate for any year in which there is a change in the number of employees, average salary or per-FTE cost of recruiting.

Vehicle Costs to the County:

Alternative schedules, hoteling, and mobile workers can reduce the costs associated with County vehicles tremendously. By reducing the transit time 20%, as in the previously mentioned example from the Department of Public Works, or 100%, as was the case in the Department of Agriculture, Weights and Measures, departments will achieve real savings or allow resources to be reallocated to other priorities. The table below can help estimate how a GWOW initiative may reduce vehicle costs.

Vehicle Savings from Alternative Work Site and/or Mobile Worker

Reduction in Miles Driven:		**Example**	**Your Dept/Div/ Program**
# of miles driven by program per year prior to Alternative Work Arrangement	A	200,000	
# vehicles in program	B	10	
Average # of miles per vehicle	C	20,000	
# of miles driven by program per year after Alternative Work Arrangement	D	135,000	
# vehicles in program	B	10	
Average # of miles per vehicle	E	13,500	
Subtract E from C to get reduction in miles (if positive) increase (if negative)	F	6,500	
The $ savings could be estimated using the Federal Allowable Reimbursement rate of $0.50/mile	**G**	**$ 3,250**	
Using Actual Costs to determine average cost per mile			
Total cost for all vehicles (fuel, depreciation, repairs)	H	77,000	
Total miles driven	I	135,000	
Average cost per mile	J	0.57	
Savings	K	3,707	

Other GWOW Benefits to Consider

Vehicle-related Costs to Employees and Society

Alternative Work Schedules and Teleworking can offer substantial savings to employees if it reduces the amount of time spent driving to and from work. Reducing traffic congestion and a reduced carbon footprint also benefit society, making GWOW a win-win solution. Be sure to include these savings when reporting out on the results of your GWOW pilot or program.

Step 6 – One-Time Costs Used to Determine ROI

One-Time Start-Up Costs:

Similar to the County's existing efforts to maximize efficiency through Business Process Re-engineering (BPR), restructuring work flows because of GWOW implementation requires a team of experienced staff and often an initial investment. There may be costs associated with development, information gathering and dissemination, equipment, and software among others. The table below can help in the process of identifying one-time start up costs. The costs identified below are only a starting point. Individual departments/programs may need to include additional one-time costs not identified here.

One Time Start-up Costs	Cost
Program Planning and Development	
Labor/time for project team members	
Legal or consultant fees	
Development of training programs	
Printing, copying, web design, materials prep	
Conducting training/staff time to attend training	
Other:	
Program Planning and Development Total	

Initial IT Set Up	Cost
IT staff time to design and implement changes	
Costs associated with changes to network, security, etc.	
Additional computer equipment for system (e.g., server)	
Additional software required for system	
Other:	
Initial IT Set Up Total	

Employee Outfitting Cost	Ave Per FTE		
Telephone			
Computer			
Devices (printer, fax, scanner, web cam)			
Software/software licenses			
Office Furniture			
Other:			
		# FTEs:	
Employee Outfitting Cost (ave x # FTEs)			

Start Up Cost Total	

Summary

In this economy, it is incumbent upon all County managers to constantly seek ways to reduce costs and increase efficiency, effectiveness, productivity and customer service. Implementing a GWOW program can benefit programs and departments in many ways, including: reduced vehicle fuel and maintenance costs; reduced facilities costs; increased staff mobility; increased efficiency and productivity; and increased customer satisfaction. Alternative work schedules; vehicle assignments, locations, and pools; staff work location assignments; and increased use of mobile technology can help County managers maximize efficiency and productivity while minimizing costs.

It is important to analyze the potential savings when looking to implement GWOW, as well as to report on actual results as projects move forward. Each County program should be evaluated to determine whether nontraditional work schedules, environments and/or equipment will facilitate an increase in

productivity and/or decrease in cost. The program manager should report on progress made each quarter towards reducing County costs and improving efficiency, productivity and customer service using results-based performance measures.

The following summary will assist you in determining the total cost savings and Return on Investment resulting from GWOW. After completing the worksheets in this guide, use the totals from each worksheet to complete the table below.

Financial Analysis Summary

Savings by Cost Factor	Current Cost (A)	Proposed Cost (B)	Savings (A – B)	Actual Year 1	Actual Year 2	Actual Year 3
One-Time Start Up*						
Absenteeism						
Facilities/Office Space/Furnishings						
Efficiency/Productivity						
Parking/Transit Pass						
Retention						
Vehicle Costs						
Total						
ROI = (Savings per year/Start Up Costs)						
Years until Start Up Costs are Recouped = Start Up Costs / Savings per Year						

** One-time start up costs can be amortized over a longer period, and compared to efficiencies and savings to determine Return on Investment and the ROI period.*

Cost per Unit (miles paved, inspections completed, etc.)	Current Cost (A)	Proposed Cost (B)	% Reduced (A-B)/A	Actual Year 1	Actual Year 2	Actual Year 3
Total cost (from above)						
Units produced						
Ave cost per unit (total cost/units)						

GWOW METRICS GUIDELINES

GWOW Metrics Committee – Has been formed to help departments develop and refine measures that assess the effectiveness of GWOW efforts, focusing on changes in performance/productivity and cost savings/cost avoidance.

Current Members – Brian Hagerty (lead), Dorothy Thrush, Mike Van Mouwerik, Kathleen Flannery, Kaye Hobson, Tracy Drager, Debbie Patag, Sandy Parks

Guidelines for Establishing and Tracking GWOW Metrics

1. Metrics should be established prior to implementation of GWOW programs.
2. Results should be reported on a periodic basis (either monthly, quarterly, or annually, depending on nature of program). Reporting can take place through established forums, such as Quarterly Presentations and GWOW website.
3. Metrics should be tailored to specific program characteristics; one size does not fit all.
4. GWOW Metrics Committee should be consulted in development and refinement of GWOW metrics.

Contact for Submission of Proposed Metrics – Brian Hagerty (619) 531-6011
brian.hagerty@sdcounty.ca.gov

Typical Measures of GWOW Success

- Changes in Productivity (using existing performance measures pre- and post-GWOW implementation)
- Cost savings/Cost avoidance
- Reduced private vehicles reimbursement and County Fleet miles
- Decreased office space costs
- Reduced fuel costs
- Reduced vehicle miles traveled
- Reduced costs for office space
- Reduced time “in transit”
- More time for field work
- Return on Investment (ROI), especially in the area of mobile technology

Specific examples of County GWOW efforts and related measures are detailed on the following pages.

- Agriculture, Weights & Measures
- Public Administrator / Public Guardian
- Department of Animal Services
- HHSA Public Health Nurses – Mobile Remote Workforce

Agriculture, Weights & Measures

Government Without Walls (GWOW) - Performance Measures/Metrics
As provided by Agriculture, Weights & Measures

Background:

When developing performance metrics for programs using alternative work schedules and locations, consider suggestions made in a recent article about "on demand government" and performance metrics at the federal level (http://ourpublicservice.org/OPS/publications/viewcontentdetails.php?id=144,) which emphasized that "on demand government" (in this case teleworking) must be integrated into existing performance management systems, not tracked in a separate metrics system. In other words, if you're already measuring success, see if shifting to a new paradigm of service delivery - teleworking - improves or worsens your existing performance measures.

Other keys to success in case studies included sanctioning a SWAT team of HR and IT management to provide critical guidance and expertise; providing necessary equipment (laptops and half the initial subscription cost and monthly fees for internet access at home); and leveraging automation for tracking the program, e.g. a complete safety list, who is teleworking when, etc.)

Based on this philosophy, here is an example of how San Diego County staff show performance measures and metrics related to our GWOW Programs:

Agriculture, Weights and Measures – Example from Operational Plan

	2010-11 Actuals	
Number of initial annual inspections for following retail devices:	**Pre-GWOW**	**Post-GWOW**
- Fuel meters inspected		
- Taximeters inspected		
- Registered water dispensers inspected		
- Registered computing scales inspected		
- Registered counter scales inspected		

In addition to these performance measures, the following operational data will be collected and tracked:

- Travel time reduced (time reduced/cost avoidance)
- Miles reduced (# of miles reduced/cost avoidance)
- LAN lines reduced (# of lines reduced/cost avoidance)
- Phone lines reduced (#of lines reduced/cost avoidance)
- Cubicles reduced (total sq. ft. reduced/cost avoidance)

Bob Atkins

Commissioner

Department of Agriculture, Weights and Measures

AWM Mobile Office

Standards Enforcement Pilot Program

- 12 inspectors - 31,000 devices annually
- Districts consists of several adjoining zip codes
- Each District has approximately 2,600 devices
- Test group consisted of 7 inspectors (control group 5 inspectors)
- Inspections completed using Accela Wireless software
- 90-day pilot from 1/26/10 to 4/27/10

Objectives

Improve Service Delivery and Maximize Inspection Efficiency by:

- Locating inspectors' headquarter facilities in their district
- Utilizing mobile IT
- Providing real time data

Reduce costs:

- Vehicle/mileage
- Space/phone/LAN

Tools

o Mobile Office: tablet PCs, web access, email, mobile printers, cell phones, VPN, wireless cards and GPS

o Network Fleet: 24/7 information on vehicle location, use, start/stop times, driving speed, accidents, maintenance needed, smog checks

Home - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address http://www.networkfleet.com/networkcar/ted/fllthome Go Links

networkfleet. DRIVING BUSINESS

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All times are displayed in the current user's time zone Pacific; Los Angeles (GMT-08:00).

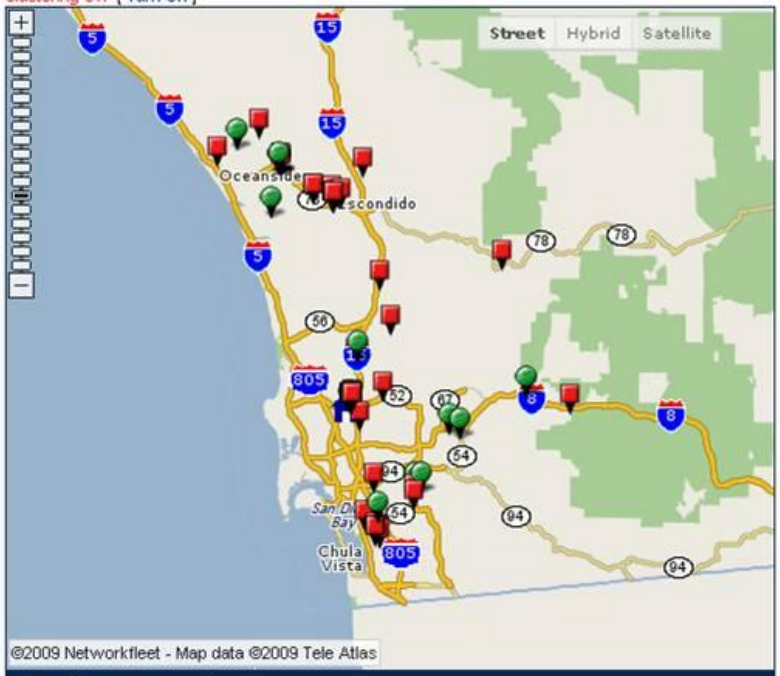
Home | Vehicles List | Fleet Map | Location List | Performance Data | Notifications | All Service Records | Reports | Learning Center

County of San Diego - Agriculture

- Administration
- Account Settings
- Group Management
- User Management
- Vehicle Management
- Landmarks
- Geofences
- Activity Alerts
- Report Scheduling
- Sensors

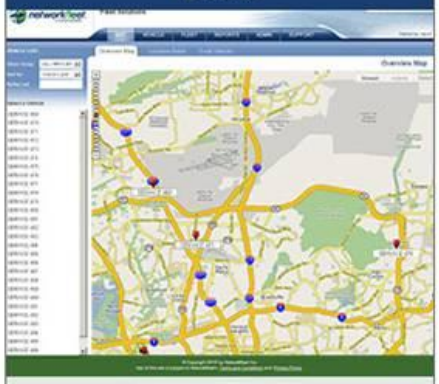
Auto-Refresh Off [Turn On] Landmarks On [Turn Off] Labels Off [Turn On]

Clustering Off [Turn On]



Toggle Map Legend

A New Networkfleet is Coming Soon!



This spring, Networkfleet will go live with an entirely new and intuitive user experience for its fleet application. The web interface will feature a more modern look and feel, better usability, added functionality, as well as numerous improvements to maps, reports, and overall navigation.

(230 items remaining) Downloading picture http://www.networkfleet.com/networkcar/JSP/Images/Landmarks/house.gif...

Internet

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Results

- **31%** higher productivity during pilot project comparing GWOW inspectors to non-GWOW inspectors
- **1,610 hours/yr** reduction in travel time traveling to and from work area = **$90,000** added value to program
- **14%** reduction in mileage = **$20,000**
- **$7,000** savings reduction in LAN line cost
- **$4,200** savings in desk phones

Department of Animal Services

DAS Leaps into the Technological Age

Background

- Requests for service are received at the Call Center on Gaines Street
- These requests for service are funneled through the Department's Dispatch unit to Animal Control Officers in the field
- In FY 2009-2010, the Department received 27,571 requests for service from the public
- With only one dispatcher per shift, they are overwhelmed by the volume of telephone calls and radio traffic

Review

- Identify existing process
- Determine average length of time for entire process
- Identify any gaps or bottlenecks
- Evaluate process improvements
- Input sought from LUEG
- Implement technological improvement

Current Process

- Phone Center takes call from citizen requesting service and enters into database
- Request for service appears on dispatcher's computer
- Dispatcher raises Animal Control Officer on air to see if officer able to receive call
- Once officer is available, dispatcher relays all information pertaining to the call
- Officer writes all information on a notepad in their patrol vehicle
  - Information frequently must be repeated to Officer

Current Process (continued)

- Upon completing a call:
  - Animal Control Officer raises dispatcher on air
  - If dispatcher is available, Animal Control Officer relays results of the call

Bottleneck

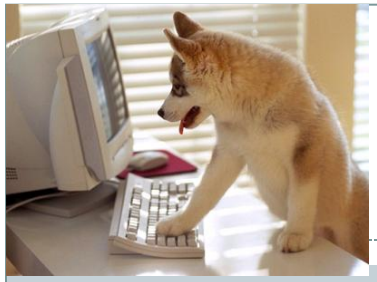
Six Animal Service Representatives entering requests for service

One Dispatcher receiving and transmitting requests for service (bottleneck)

From 6 to 15 Animal Control Officers receiving requests for service

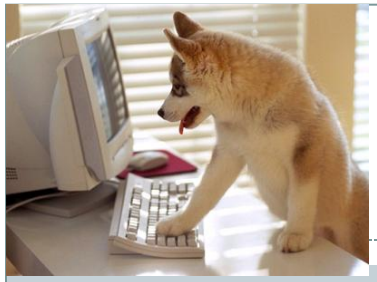
Potential Risks

- Requests for service delayed in getting to the officers in the field (especially for injured, abused or aggressive animals)
- Dispatcher unable to answer emergency telephone in a timely manner due to on-air traffic
- Officer forgetting a call that has not been handled



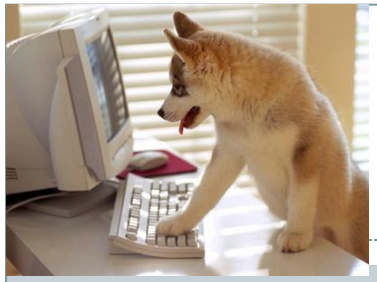
Process Improvements

- Animal Control Officers issued Panasonic Toughbooks
- Animal Control Officers thus able to pull requests for service directly from the computer negating the need to have the dispatcher relay them over the air
- Animal Control Officers able to check the status of a dog license and a person's prior record from the field
- Animal Control Officers able to enter their own results from a request for service, thus relieving the dispatcher from having to do so
- Dispatcher able to concentrate on answering emergency telephone



Process Improvements

- Animal Control Officers able to write their reports while still in the field thus minimizing down time
- In the near future, Animal Control Officers will be entering animals they impound immediately into the database which saves them time when returning to the shelter; therefore officers remain in field longer



Process Comparison

Current Process / Baseline (Dept)

Time to dispatch a call:

3 minutes/ call

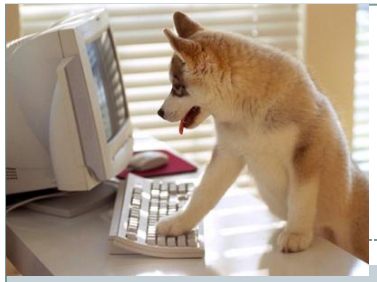
Improved Process (Dept)

Time to dispatch a call:

30 seconds / call

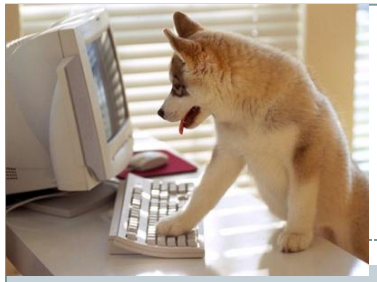
Projected Productivity Savings (Dept)

1100 hours per year redirected to other dispatch duties



Process Comparison

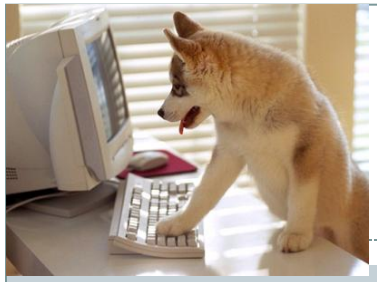
Current Process / Baseline (Dept)	Projected Improved Process (Dept)	Projected Productivity Savings (Dept)
Officer's time in field: 6.5 hrs/ shift	Officer's time in field: 8 hrs/ shift	5000 hours per year redirected to other patrol duties



Costs

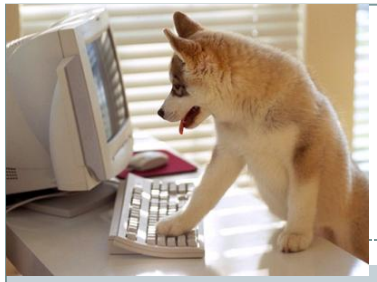
Laptop Costs	One Time Only	On-Going
Purchase and installation of mounting equipment	$ 21,221.22	
Laptop Lease		$6,465.36
Remote Access		$363.63
Verizon Air Charge		$1,395.00
MTHLY COST		$8,223.99
ANNUAL COST*		$98,687.88

* Reduced one Lt. ACO position to fully off-set costs.



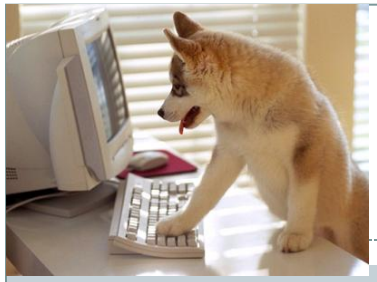
Challenges

- DAS laptops were different than those deployed by LUEG, so there were differences in the ordering and installation process
- Wrong parts ordered for mounting brackets
- Numerous issues with activating built-in aircards
- DAS must stagger vehicles being sent to Fleet for installation due to DAS and Fleet workload.



Risks

- Theft of laptops
  - Laptops are locked into docking stations inside of a locked vehicle
  - At the end of shift, laptops are removed and locked in employee's locker
  - DAS looking into cabinets where laptops can be locked in individual compartments, charged and connected to server



Next Steps

- 75% of the laptops have been issued to Animal Control Officers. Remainder should be deployed by end of January.
- DAS considering installing printers in vehicles.

HHSA Public Health Nurses – Mobile Remote Workforce

Quality and Performance

Function 1 - Intake Process

Assessment Point 1 - Complete, Accurate and Appropriate Referrals

The design team identified problems with the referral intake process. Essentially all referrals were accepted with the clerk's primary responsibility to time stamp the referral and forward to the Public Health Nurse (PHN) supervisor for review and assignment. Absence of explicit referral information standards resulted in referrals lacking essential information.

- 43% with no contact information
- 65% with no referral source information
- 33% with no reason for the referral

As a consequence PHN supervisors and/or PHNs spent considerable time determining who referred what client for what services.

The design team developed policy and procedures to establish what came to be called the *Accurate, Complete and Appropriate* referral standards. Included in the standards:

- Core referral data set
- Procedures for returning a referral to a referral source for completion
- Procedures for rejecting a referral for non-covered services
- Procedures for addressing ambiguous referrals
- Allocation of responsibilities between clerical, supervisors and nurses

When compared against the new *Accurate, Complete and Appropriate* standards less than 2% of referrals received at North Inland Health Clinic (NIHC) and less than 18% at North Coastal Health Clinic (NCHC) in 2004 would have been accepted. Referrals for minors were particularly problematic with 15% (NIHC) and 23% (NCHS) missing the name and contact information for the parent/guardian.

The table below reflects the pre/post status of referrals received at both NIHC and NCHC. Fields in **red** are statistically significant at the .95 levels.

Pre/Post Percentage Complete and Accurate Referrals

Complete and Accurate Criteria	North Inland PHC		North Coastal PHC	
	Pre	Post	Pre	Post
Referrals meeting Minimal Standards	2%	100%	18%	100%
Referrals with "day received" time stamp	73%	100%	69%	100%
Referrals without any contact information	15%	0%	1%	0%
Minor's Referrals Missing Parent Information	15%	0%	23%	0%
Duplicate Referrals	15%	1%	3%	1%

Assessment Point 2 - Referral Workflow Re-Engineering - Clerical

The new Policy and Procedure defining *Accurate, Complete and Appropriate* standards permitted re-engineering of staff responsibilities. Specifically activities the PHN supervisor and/or PHN were performing could be shifted to the clerk. The new process entailed the clerk reviewing all incoming referrals to determine if they met the complete Accurate and Appropriate Criterion. If they did not, a preformatted letter went to the referral source asking they complete the "full" referral process. If there was some doubt, the clerk deferred to the PHN supervisor for a decision. The installation of *Accurate, Complete and Appropriate* Policy and Procedures combined with the re-engineering of agents-functions dropped the average cost to process referrals by 90% (the difference between a PHN at a mean $31.35 per hour vs. a clerk at a mean of $14.78 per hour plus the nearly 100% improvement in completeness of the referrals). Estimated projected savings for 1000 NIHS referrals are $47,920 per year.

Assessment Point 3 - Referral Workflow Time Sequences – Time-to-First -Contact

Improved *Accurate, Complete and Appropriate* standards means less time was spent in processing referral information with subsequent decrease between time of referral receipt and time to first PHN-client contact. To reveal the range of time spent in each intake process step, the data for NIHC are reported as *quartiles*[1]. 25 % (4th quartile) of all referrals to NIHC during the PRE-pilot phase experienced a delay of 373 days or greater from referral to first contact. Since PHN Services are, by definition, for emergent problems, this delay was clearly counterproductive. With the *Accurate, Complete and Appropriate* standards in place, the same quartile was reduced by more than 75% to 60 days. 84% of all referrals were seen within 11 days from time of referral. All workforce time sequences showed improvement.

The table below reflects the changes by quartiles in the time sequences from receipt of referral to time of first PHN-Client contact. Fields in **red** are statistically significant at the .95 levels.

Time sequences

	1st QRTL	2nd QRTL	3rd QRTL	4th QRTL
NIHC -PRE				
Referral to Intake	1 days	6 days	9 days	18 days
Intake to PHN	1 days	3 days	15 days	74 days
PHN receipt to First Contact	6 days	11 days	20 days	145 days
Referral to First Contact	4 days	8 days	14 days	373 days
NIHC -POST				
Referral to Intake	1 days	1 days	4 days	12 days
Intake to PHN	0 days	0 days	0 days	1 days
PHN receipt to First Contact	1 days	4 days	7 days	57 days
Referral to First Contact	2 days	7 days	11 days	60 days

[1]The value of the boundary at the 25th, 50th, or 75th percentiles of a frequency distribution divided into four parts, each containing a quarter of the population.

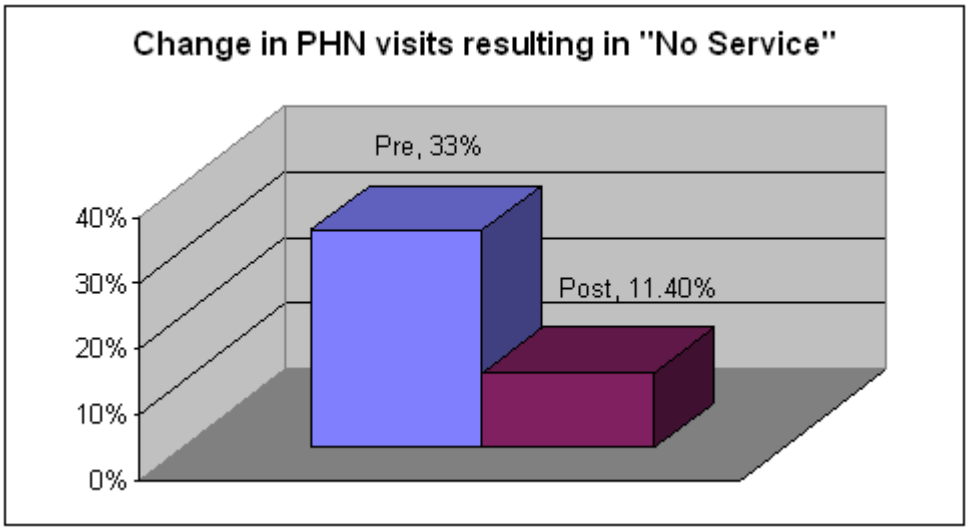
Assessment Point 5 - Improved PHN Time with Client

Improving the rapidity with which "first contact" is made should have 2 major consequences:

- Reduced number of "No service" first contracts (first contacts in which the service is either refused or no longer needed)
- Increased number of "first contacts" per PHN FTE per month.

The chart below reflects the changes in the percent of first PHN-Client contacts that resulted in "No Service". Since "No Service" represents considerable costs (direct and opportunity) embedded in the referral processing, and PHN time (for travel, documentation and encounter) the reduction is a significant improvement in productivity.

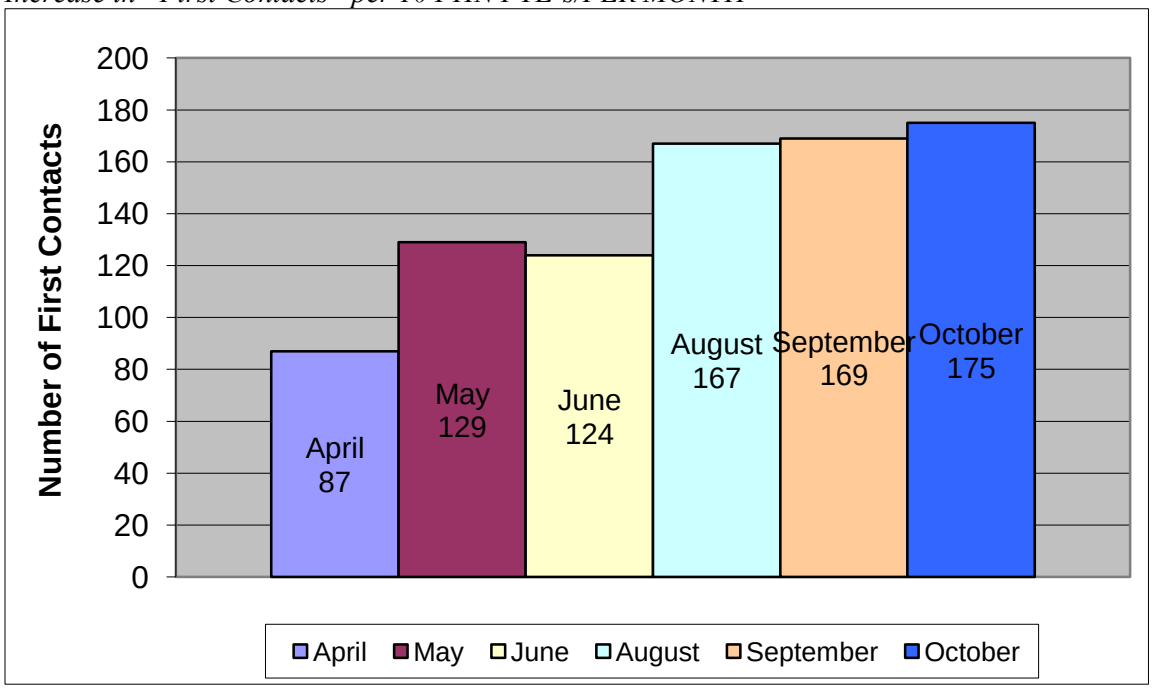
PHN Visits (NIHC) resulting in "No Service"



It is worth noting there seems to be a critical window in terms of timeliness from referral sent to first PHN-Client contact affecting "No Service". NCHC did not see a change in percentage of referrals culminating in "No Service" with rates of 22% and 20% for the pre/post phases. Improved PHN time with clients is attributable to decreased time spent searching for clients and wasted visits that result in "No Service".

The chart below shows over a 25% increase in "first contacts" per PHN FTE per month in the 3rd quarter of 2005 compared to the 2nd quarter of the year. This represents a substantial cost-benefit (benefit defined from a societal standpoint) and a substantial cost-improvement in the unit costs per client hour.

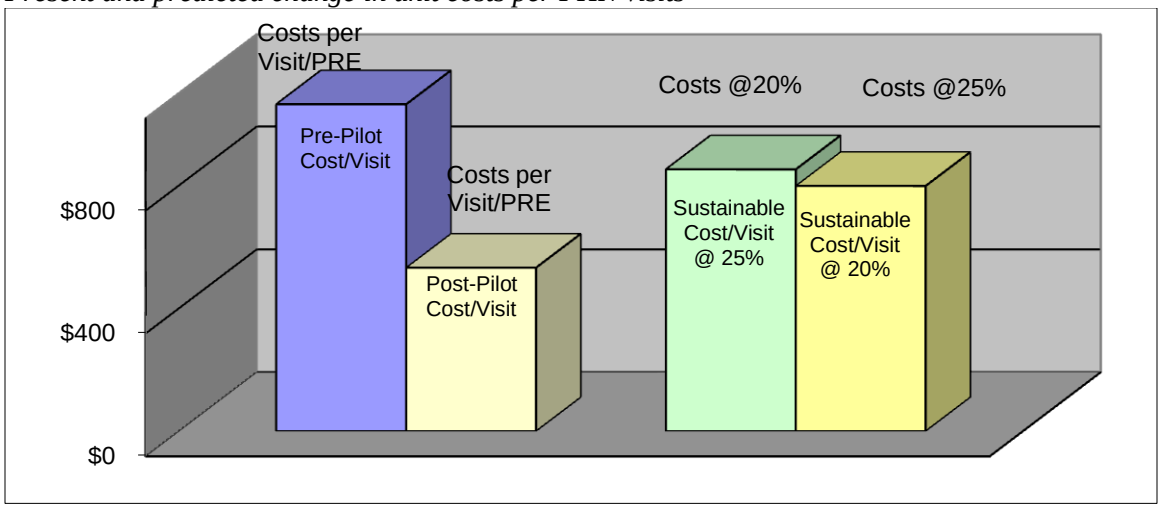
Increase in "First Contacts" per 10 PHN FTE's/PER MONTH [2]



Assessment Point 7 - PHN Visit Unit Costs

If the same PHN is able to see more clients, the cost of each visit is reduced as the PHN salary is spread across a larger number of visits. Using the same PHNII/III average salary based used to generate the average hourly and the average increase in the number of visits listed in Assessment Point 3, unit costs were reduced from $1064 per visit to $532 per visit. However, per the warning in Assessment Point 3, a sustainable 20-25% increase represents a reduction in unit price to between $798 to $852.

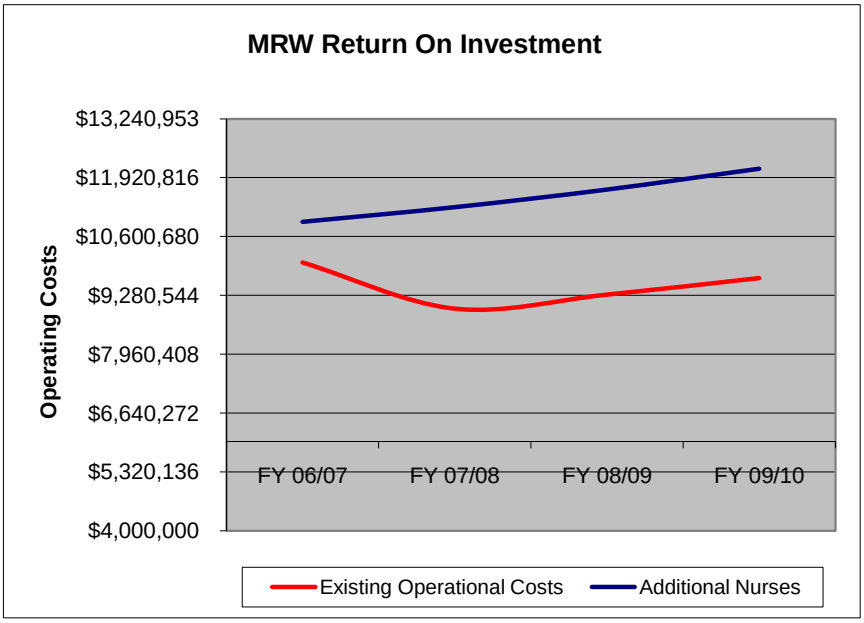
Present and predicted change in unit costs per PHN visits

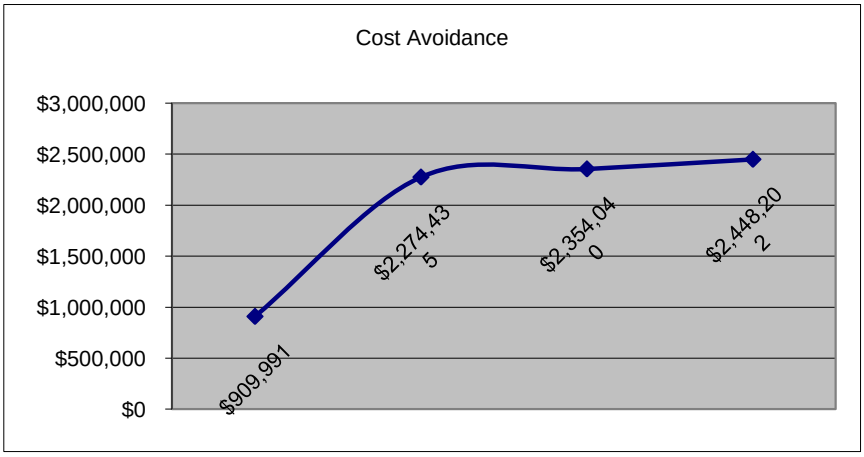


Note- this only includes the cost of the PHN and does not include predicted savings in mileage or travel time.

Return On Investment				
Costs	**FY 06/07**	**FY 07/08**	**FY 08/09**	**FY 09/10**
Salaries/Benefits for 79 PHNs*	$8,722,348	$8,984,018	$9,298,459	$9,670,397
MRW Investment Cost	$1,298,198	$0	$0	$0
MRW Ongoing Costs	$0	$102,393	$102,393	$102,393
Existing Operating Costs	$10,020,546	$8,984,018	$9,298,459	$9,670,397
Salaries/Benefits for 99 PHNs*	$10,930,537	$11,258,453	$11,652,499	$12,118,599
Return On Investment	$909,991	$2,274,435	$2,354,040	$2,448,202

***This reflects nurses current FY06/07 salary.**





ROI Salary Cost				
# of Positions	FY06/07	FY07/08	FY08/09	FY09/10
1	$70,314	$72,424	$74,959	$77,957
79	$5,554,838	$5,721,483	$5,921,735	$6,158,604
99	$6,961,126	$7,169,959	$7,420,908	$7,717,744

ROI Salary & Benefits Cost				
# of Positions	FY06/07	FY07/08	FY08/09	FY09/10
1	$110,409	$113,722	$117,702	$122,410
79	$8,722,348	$8,984,018	$9,298,459	$9,670,397
99	$10,930,537	$11,258,453	$11,652,499	$12,118,599

Hourly Rate	$53.08	$54.67	$56.59	$58.85
Office Support Specialist Hourly R		$25.40		
Annual Salary		$33,862		
Annual plus benefits		$52,825		

Annual MRW Costs				
# Positions	Desktop	Tablet	Difference	Wireless
1	$2,380	$2,896	$516	$780
79	$188,017	$228,790	$40,773	$61,620
99	$235,616	$286,712	$51,096	$77,220
Total Annual Costs		$102,393		

COSTS FOR TOSHIBA CONVERTIBLE PC DEPLOYMENT

All Costs are approximate (Except for established resource Units)

DEVICE	MONTHLY FEES	ONE-TIME COST	
Toshiba M400 tablet (Requires new Resource Unit)	141.08		Approximate
End User Data Jack	85.26		Established Resource Unit
Email Account	10.92		Established Resource Unit
Personal Storage (H and S Drive)	4.08		
17" Flat panel Monitor		290.39	
Wheel Mouse		8.53	
Keyboard (USB)		19.06	
Toshiba Port Replicator		200.00	
Backup Battery Pack			Not available in catalog
Charger			Not available in catalog
External Wireless Card Devise	varies	20.00	Approximate
Total One Time Costs per workstation		537.98	
Total Monthly Fee per workstation	241.34		
Total Annual per workstation	2,896.08		
Total One Time costs for 90 workstations		48,418.20	
Total Costs for 90 workstations Monthly	21,720.60		
Total Annual costs monthly for 90 workstations	260,647.20		

Verizon Air Card Service per Tablet (monthly)	65.00	M400 tablet comes with built in WAN device ready for use with Sprint/Nextel
Annual Charge Verizon Aircard Service per Tablet	780.00	Nextel Estimates $59.99 per month - Firm quote pending.
Verizon Aircard Service 90 tablets monthly	5,850.00	
Verizon Aircard Service 90 tablets annual	70,200.00	

The above Airtime wireless service is to be purchased outside the NG contract and paid monthly with County P-Card or using a Countywide Blanket PO.

Region	PC/Laptop	Email	Data Jack	Level 2 Storage	Total Monthly Cost	Voice Line Cost	Voice Mail	Total Monthly	Printer Cost	End User Data Jack	Total Monthly
Standard PC	$92.35	$10.92	85.26	4.08	**$192.61**						
CWS/CMS PC	$57.00	$10.92	85.26	4.08	**$157.26**						
CalWin PC	$57.00	$10.92	85.26	4.08	**$157.26**						
Laptops	$130.97	$10.92	85.26	4.08	**$231.23**						
Tablets	$141.08	$10.92	85.26	4.08	**$241.34**						
Terminals	$41.51	$10.92	85.26	4.08	**$141.77**						
Voice Jack - Single-Line						$43.81	$3.52	**$47.33**			
Voice Jack - Multi-Line						$45.47	$3.52	**$48.99**			
Network Printer (Monochrome)									156.04	85.26	241.30
Network Color Printer (High Volume)									400.08	85.26	485.34
Network Color Printer (Low Volume)									171.89	85.26	257.15

Notes:

1. Email is necessary for each employee, but only on the primary device that the employee uses.
   Example: If Employee has a standard PC assigned, and a laptop, an email account would be necessary only on the PC, but not the laptop. If employee has only a laptop assigned, then an email account would be necessary for the laptop.
2. In addition to an email account for each employee, an email account price for each resource (e.g., conference rooms, Projectors, Laptops) that could be scheduled would need to be included in the budget.
3. Datajacks are required for each PC, and Printer in an office. However, a single datajack may be assigned to several mobile devices, such as laptops
4. On Desktop phones, voicemail would be used for any employee requiring it. However, it is optional for phones that are in areas where it would not be required, such as lobbies, and multi-user phones. It could be possible for employees who are always mobile, to eliminate the desk phone, but keep the voicemail open and forwarded to a cell phone. This would save the cost of a desktop phone.
5. If a PC is shared among many users, there is only the PC price point for the one PC, and one Data Jack, plus an email resource unit for each employee.
6. Storage resource unit is for data storage on current H and S drives. $4.08 per Gigabyte per month. Recommended estimate could be for 1/2 gigabyte per employee until a baseline can be established.

REGIONAL ONGOING COSTS FOR TOSHIBA CONVERTIBLE PC FOR FY 07/08					ONE-TIME COSTS COVERED IN FY 06-07
Region	**Number of Tablets**	**Monthly Charge**	**Total Monthly Charge**	**Annual Charge**	**One-Time Costs**
North Central	11	$113.73	$1,251.03	$15,012.36	$5,917.78
North Inland	12	$113.73	$1,364.76	$16,377.12	$6,455.76
North Coastal	12	$113.73	$1,364.76	$16,377.12	$6,455.76
East	18	$113.73	$2,047.14	$24,565.68	$9,683.64
South	12	$113.73	$1,364.76	$16,377.12	$6,455.76
Central	14	$113.73	$1,592.22	$19,106.64	$7,531.72
PHN Admin	1	$113.73	$113.73	$1,364.76	$537.98
Total:	**80**		**$9,098.40**	**$109,180.80**	**$43,038.40**

Notes:
Monthly cost for wireless card will vary depending on provider selected.
Monthly charge includes difference in cost between tablet and desktop plus $65 estimate for wireless service.
The one-time costs will be covered by the Avoidables for FY 06/07.
One-time costs will go up once we receive a price point for the backup battery and charger.
If regions choose to have a backup desktop computer in their office they should add another $192.61 a month for each PC they request.

Public Administrator / Public Guardian

Lori Bays

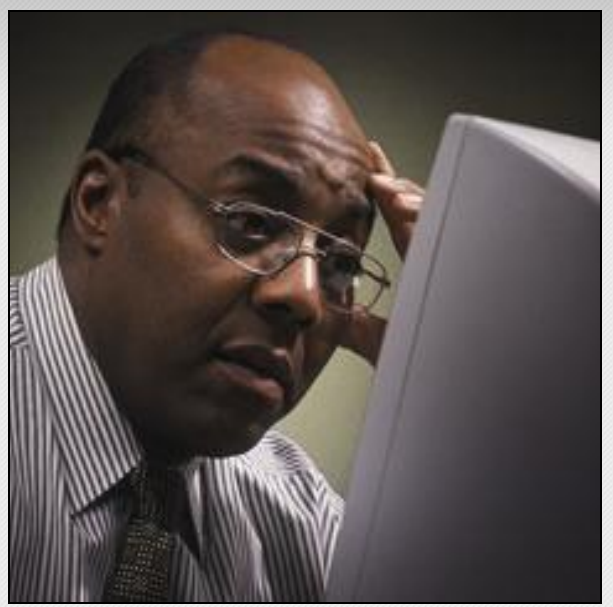
Public Administrator/Public Guardian

County of San Diego

PA/PG

- 44 staff
  - **Public Guardian**
  - **Public Administrator**
  - **Property Services**
  - **Indigent Burial/Cremation**

Previous Challenges



- Time wasted in transit
- Limited file access in field
- 8-hour day stifled projects

Re-design: Flexible Workforce Pilot

- **Phase I: FY 08/09**
  - 4/10s
  - Teleworking
- **Phase II: FY 09/10**
  - Mobile Remote Workforce

Performance Measures

Performance measure	Baseline	Pilot (09-10) Totals to date
PG assessments completed & approved within 95 days of previous assessment.	93%	**99 % (312/314)** Target = 95%
Begin PA investigations within 2 business days of case assignment.	44%	**96 % (640/665)** Target = 90%
Inventory & Appraisal reports to Probate Court within 120 days.	67%	**100% (18/18)** Target = 85%

Re-design: Technology

- Laptops
- VPN
- Wireless cards
- E-fax
- Web-referrals (6/2010)

Results: Benefits to County

- Space/cost savings
- Improved staff retention/recruitment
- Decreased carbon footprint
- Increased staff morale

Next Steps…

- **Permanent reduction in office space**
  - Hot desks
  - **Completely mobile workforce***
  - Web-referral system (June 2010)
  - Electronic file system
  - Elimination of land-line telephones
  - Increased use of smartphone/hand-held devices

*select positions

Subject	Policy Number	Page
Teleworking	C-26	1 of 2

Purpose

To allow flexibility in employee work schedules and locations while reducing costs, maintaining or enhancing County service and productivity levels, and reducing the County's carbon footprint.

Background

Teleworking is defined as work arrangements in which an employee performs officially assigned duties at home or at other worksites while utilizing various forms of telecommunications technology for a significant portion of their work. This can include communication with managers, colleagues and the public.

Policy

It is the policy of the Board of Supervisors that:

Teleworking programs may be implemented in County departments, where appropriate, as defined by the criteria established by the Department of Human Resources. County employees shall participate in the teleworking programs on a voluntary basis and shall comply with all County and Department policies, ordinances, practices, and instructions.

The Board of Supervisors delegates authority to the CAO for the implementation and execution of this policy. The CAO shall promulgate the necessary administrative procedures to implement, execute, and evaluate the provisions of the teleworking policy.

With the approval of the CAO, an appointing authority may implement a teleworking program following criteria established by the Department of Human Resources in applicable administrative procedures.

Productivity must be maintained by the teleworker. Evaluation shall be conducted using methods of productivity measurements as delineated in the administrative procedures.

Selection for participation in this program shall not present an employee an advantage or disadvantage when measuring performance. Sunset Date

This policy will be reviewed for continuance by 12-31-17.

Board Action

01-30-90 (91)

09-18-90 (36)

04-04-95 (28)

03-14-06 (11)

12-09-08 (33)

CAO Reference

1. Department of Human Resources

SUBJECT: **TELEWORKING** POLICY NUMBER: **108**

EFFECTIVE DATE: **July 1, 2001**
REVISED DATE: **March, 2011**

PURPOSE

The purpose of this policy is to communicate the administrative process for implementing Board of Supervisors' Policy C-26 concerning teleworking.

POLICY

To allow flexibility in employee work schedules and locations while reducing costs, maintaining or enhancing County service and productivity levels, and reducing the County's carbon footprint.

DEFINITION OF TELEWORKING

Teleworking is defined as employees working from a remote site, other than their primary work location. It can include working from one's home, from a satellite work office, or from a neighborhood work center. The technology can range from telephones to personal computers, modems, FAX machines, and voice mail.

PROCEDURE

A. **Request to Telework:** An appointing authority may request approval from the CAO to implement a teleworking program by submitting a plan to his or her Group General Manager, who will review and make a recommendation to the CAO. The plan should address all the points enumerated in the criteria for implementing teleworking.

B. **Criteria for Implementing Teleworking:** Teleworking does not change the appointing authority's authority for determining what gets done, how it's to be done, and the performance standards. In fact, standards should be no different for teleworkers than they are for those not teleworking; nor should efficiency be decreased. In order to receive approval to telework:

1. Each participating department must designate a manager to act as a teleworking coordinator.
2. Each participating department must determine that an alternative worksite, such as a home office, is appropriate for the County of San Diego tasks performed by the involved worker.
3. Each participating department must keep the following records:
    a. Name and classification of the employee who will be teleworking;
    b. Number of days that each individual teleworks.
4. Each participating employee should have a teleworking plan approved by one's supervisor.
5. Each participating employee must log the total number of hours and specific time(s) worked each day he or she teleworks.
6. Each participating employee should have a supervisor-approved, safety-inspected teleworking environment.
7. Each participating employee must have a telephone and voicemail.
8. Each participating employee must be able to be reached during certain hours set by one's supervisor.

9. All teleworkers and their supervisors should attend training sessions conducted by their departmental teleworking coordinator.
10. All participating departments must submit reports, upon request, to their Group General Manager. General Managers will provide a copy to the Director of Human Resources so that evaluation reports can be made periodically to the Board of Supervisors.

C. **Tracking and Reporting Teleworking Hours and Days:** The County of San Diego (COSD) Teleworking Report is generated out of the County's Time Collection system and is used to report the number of hours and days an employee teleworks during the calendar year. It is the responsibility of the Teleworking Program Coordinator to generate this report on a regular basis for his/her business unit or department.

TELEWORKING INSTRUCTIONS AND FORMS

Sample forms and instructions are available on the GWOW website. However, if the Group General Manager chooses to develop a different manual, it must fully comply with the Board of Supervisors Policy, Administration Manual Policies, and any Chief Technology Office policies relating to teleworking.

FURTHER INFORMATION

For further information, contact your Departmental Human Resources Officer or designated teleworking coordinator in your department.

FORMS

Sample Teleworking Forms are available on the GWOW website.

REFERENCES

Board of Supervisors Policy C-26
Administrative Manual Policy 0050-03-9

SUPERCEDES

DHR Policy 1135A, Telecommuting

APPROVED BY:

Original document approved and signed by Carlos G. Arauz on.

Carlos G. Arauz**,** Director
Department of Human Resources

Telework or Alternative Work Checklist

Question	Yes	No	Mitigation Plan (if Necessary)	N/A
Position/Function/Program (P/F/P)				
Can the P/F/P perform the necessary interactions with internal or external customers, co-workers or project workgroups during the times proposed for alternative worksites/hours?				
Would supervisors, co-workers and/or customers be negatively affected by the employee working alternative sites/hours or offsite? If so, be prepared to explain mitigation plan to Appointing Authority/GM.				
Does the P/F/P have clear work objectives, with timelines and clear expectations and deliverables that are measurable?				
Does using GWOW with this P/F/P present an opportunity to reduce non-productive travel time?				
Can this P/F/P partner with other County or non-County offices to obtain necessary work space?				
Is access to a computer, high speed internet access, appropriate security software, and other necessary materials required?				
Could the necessary internal coordination, consultation, work product standardization and communication be established and maintained?				
Individual				
Does this individual have a track record of being able to work independently and/or with little direct supervision?				
Does this individual consistently maintain a satisfactory or above-average performance record?				

_____
Last Name, First Name

ATTACHMENT A

COUNTY OF SAN DIEGO

Teleworker's Assignment

Teleworking, or working from another location such as home or an office close to home, is an assignment that the County of San Diego may choose to make available to some employees when a mutually beneficial situation exists.

Teleworking is not an employee benefit, but rather is an alternate method of meeting the needs of the County. Employees do not have a "right" to telecommute; the arrangement can be terminated by either the employee or the County at any time.

These are the conditions and arrangements for teleworking agreed upon by the teleworker and supervisor.

Location The employee agrees to work at the following location:

List address here _____

The employee agrees to provide a designated, safe work space if working at home.

Schedule The employee's teleworking schedule is as follows:

Monday	_____	Thursday	_____
Tuesday	_____	Friday	_____
Wednesday	_____	Other	_____

Assignment The following are the assignments/productivity objectives to be worked on by the employee at the remote location with the expected delivery dates:

Phone Calls The following is the arrangement agreed upon for handling telephone calls made by the teleworker from the remote work location for County business:

The employee agrees to call the central office to obtain his/her messages at least _____ times per day.

The employee agrees to use a County-issued telephone (cellular or land line).

Supplies

Employee agrees to obtain from central office all supplies needed for work at the alternative location; out-of-pocket expenses for supplies regularly available at the County office will not normally be reimbursed.

Equipment

The employee is using the following personal equipment:

Records and Logs

The employee agrees to maintain records of total number of hours and specific time(s) worked each day.

Other

Additional conditions agreed upon by the teleworker and the supervisor are as follows:

Justification

Review and Signatures

This assignment has been reviewed and agreed upon prior to participation in the County's teleworking program.

Print Name	**Employee ID Number**	**Phone No.**

Teleworker's Signature	**Date**

Supervisor Signature	**Date**
Teleworker Coordinator's Signature	**Date**

_____
Last Name, First Name

ATTACHMENT B

COUNTY OF SAN DIEGO

TELEWORKING WEEKLY REPORT

Name _____ Empl ID _____ Week of _____

Work Record

Day	Work Hours
Monday	_____
Tuesday	_____
Wednesday	_____
Thursday	_____
Friday	_____

Work Progress:

Assignment	Due Date	Status	Hours Worked

Costs Avoided: _____ **Costs Incurred:** _____

Benefits: _____ **Problems:** _____

Print Name Phone Number

Employee ID No. Date

Employee Signature

Supervisor Acknowledgment

_____
Last Name, First Name

ATTACHMENT C

COUNTY OF SAN DIEGO

Recommended Safety Checklist for Home Offices

This form is a reminder of general areas and items to be provided by the teleworker and self-reported by the teleworker.

Location inspected (address):_____
Street City Zip Code

Fire Protection	☐ Smoke Detector ☐ Fire extinguisher, minimum rating 2A-10BC
Emergency Procedures	☐ Evacuation plans established ☐ First Aid supplies adequate
Electrical Requirements	☐ Only 3-wire grounded, circuit breaker extension cords with surge protection shall be used Note: The facility must be 3-wire grounded to provide this protection; many older homes have 2-wire systems and will not afford the needed protection. ☐ Electrical equipment and tools properly maintained ☐ Circuit breaker or fuse panels are properly labeled and are accessible ☐ No electrical cords create tripping hazards ☐ Sufficient ventilation for electrical components
Household Equipment	☐ Heating/air conditioning, if present, in good repair ☐ Household appliances in safe working order
Ergonomic Evaluation	

Print Name	**Employee ID Number**
Employee Signature	**Date**

Employee Self-Reported Safety Checklist Received by Supervisor		
Supervisor Name	**Signature**	**Date**

Last Name, First Name

ATTACHMENT D

COUNTY OF SAN DIEGO

Teleworking Equipment Assignment Form

As part of my Teleworking Contract, I accept responsibility for the following equipment to complete assignments.

Type of Equipment & Brand Name (List each component separately)	**Asset Number**

I agree to:

- Remain in compliance with the County's IT policies
- Maintain the above equipment in operating condition
- Operate it safely and return it to my supervisor if I resign, am transferred, discontinue teleworking or at the County's request.

In addition, I agree to use this equipment only in the conduct of County business.

Print Name		**Employee ID Number**
Employee Signature		**Date**
Supervisor's Name (Print)	**Signature**	**Date**

_____
Last Name, First Name

ATTACHMENT E

COUNTY OF SAN DIEGO

COMPUTER VIRUS PROTECTION AND SOFTWARE COMPLIANCE FOR TELEWORKERS

This form is used to ensure that teleworkers in the County of San Diego who access the departmental computer system have read and agree to the County's IT Policy as summarized below:

1. County Policy mandates that no unlicensed ("pirated") software may be installed on computing systems used to conduct County business. No unlicensed software may be installed on a computer that is in use for teleworking.

2. Regular virus scans must be scheduled for all departmental microcomputers (including those used on assignment to teleworkers) and by each participant using a privately owned microcomputer for teleworking, on a schedule designated by their Teleworking Program Coordinator.

3. All electronic documents and files created offsite will be written to a CD or flash drive rather than transmitted directly (uploaded) to any departmental computer system. The CD or flash drive will then be scanned for viruses on a department-designated computing system before being loaded onto a departmental computer system (a County LAN or hard drive).

I have read and agree to the requirements specified above.

Print Name	**Employee ID Number**	**Phone Number**
Employee Signature		**Date**

_____
Last Name, First Name

ATTACHMENT F

COUNTY OF SAN DIEGO

ANNUAL RENEWAL FORM FOR HOME OFFICES SAFETY

_____
List your teleworking location address here

I still reside at the same location, which was self-inspected and approved on _____.

All safety items remain in compliance and good working condition.

Print Name		**Employee ID Number**
Employee Signature		**Date**
Supervisor's Name (Print)	**Signature**	**Date**

Telework or Alternative Work Checklist

Question	Yes	No	Mitigation Plan (if Necessary)	N/A
Position/Function/Program (P/F/P)				
Can the P/F/P perform the necessary interactions with internal or external customers, co-workers or project workgroups during the times proposed for alternative worksites/hours?				
Would supervisors, co-workers and/or customers be negatively affected by the employee working alternative sites/hours or offsite? If so, be prepared to explain mitigation plan to Appointing Authority/GM.				
Does the P/F/P have clear work objectives, with timelines and clear expectations and deliverables that are measurable?				
Does using GWOW with this P/F/P present an opportunity to reduce non-productive travel time?				
Can this P/F/P partner with other County or non-County offices to obtain necessary work space?				
Is access to a computer, high speed internet access, appropriate security software, and other necessary materials required?				
Could the necessary internal coordination, consultation, work product standardization and communication be established and maintained?				
Individual				
Does this individual have a track record of being able to work independently and/or with little direct supervision?				
Does this individual consistently maintain a satisfactory or above-average performance record?				

Supervisor / Manager Alternative Work Schedules and Time Reporting Guide

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Background and Purpose

The purpose of this guide is to provide instruction to supervisors/managers on how to establish alternative work schedules for their employees with specific regard to the County's Time and Labor Collection System, Kronos. It is important that alternative work schedules be limited to what is provided in this policy to insure that the County remains in compliance with employment law and union agreements.

Regular Work Schedule

The regular work schedule in most County departments is generally five days per week; 8 hours per day with a 1-hour unpaid meal break and two paid 15- minute rest periods, one in the mid-morning and another in the mid-afternoon. Some departments or work units have varying durations for lunch, break periods, workday and/or workweek. Schedules for 24-hour operations vary according to the services provided.

The County's Memoranda of Agreements (MOAs) and Compensation Ordinance define the standard work periods for non-exempt employees (who are subject to Fair Labor Standards Act (FLSA) overtime rules) and exempt employees (who are not subject to FLSA overtime rules).

- **Non-Exempt Employees:** The standard work week is seven consecutive days that includes two consecutive days of rest in a seven consecutive day period. This work period shall be no greater than 40 hours unless otherwise stated in the MOA and/or Compensation Ordinance.
- **Exempt Employees:** The standard work period is 14 consecutive days within which is included four days of rest in a 14 consecutive day period. This work period shall be no greater than 80 hours unless otherwise stated in the MOA and/or Compensation Ordinance.

Alternative or Flexible ("Flex") Work Schedule

An alternative or "flex" work schedule is defined as a schedule outside the regular work schedule, as defined by the appointing authority. Before agreeing to an alternative work schedule, the supervisor must first verify that there is adequate work coverage during normal business hours. In addition, the supervisor must verify that the employee adheres to the standard work week or work period requirements based on his/her class FLSA status.

Employees in non-exempt classes, whose work week cannot exceed 40 hours unless otherwise stated in the MOA and/or Compensation Ordinance, are eligible for the following alternative work schedules:

- **4/10 Schedule** - Employee works four days during each work week; employee works 10 hours per scheduled day.
- **4/9 & 1/4 Schedule** - Employee works five days during each work week; employee works four days at 9 hours per day and one day at 4 hours.

Employees in exempt classes, whose schedule for the work period (two work weeks) cannot exceed 80 hours unless otherwise stated in the MOA and/or Compensation Ordinance, are eligible for the following alternative work schedules:

- **4/10 Schedule** - Employee works four days during each work week; employee works 10 hours per scheduled day.
- **4/9 & 1/4 Schedule** - Employee works five days during each work week; employee works four days at 9 hours per day and one day at 4 hours.
- **9/8/80 Schedule** - Employee works five days during one work week with four days at 9 hours and one day at 8 hours (totals 44 hours), and four days during the other work week with four days at 9 hours per day (totals 36 hours).

Establishing an Alternative Work Schedule

The hours of work for an office or facility shall be established by the appointing authority. Such departments / offices may have a policy in place regarding use of alternative work schedules. However, as a general practice, establishing an alternative work schedule for an employee requires an agreement between the employee and supervisor on a schedule that meets the aforementioned alternative work schedule requirements (Section III above) and has an effective date. After the agreement has been documented, the schedule needs to be entered into the County's Time and Labor System, Kronos. It is critical that Kronos reflects the correct schedule so that employees are paid correctly and the County's system of record keeping has accurate information.

In order for an employee's alternative schedule to be timely adopted in Kronos, the supervisor needs to work with his/her Department HR/Payroll Office immediately after an agreement is made with the employee. Supervisors are to submit the completed and signed/approved Alternative Work Schedule Request/Agreement Form to Department HR/Payroll. This form includes the following information which is required to set the new schedule in Kronos:

1. Employee name and 6-digit employee ID
2. Effective date of the new schedule change. **Note:** The effective date must equal the beginning of the current or a future pay period. A schedule cannot be backdated and cannot begin in the middle of a pay period.

3. Schedule days and duration. Example: Monday to Thursday, 10 hours per day.
4. Schedule start and end time. Example: Monday to Thursday, 7:00 am to 6:00 pm.
5. Meal / Lunch Break duration. Example: Monday to Thursday, 1 hour lunch.

KRONOS SCHEDULES

Department Payroll Support and Timekeepers/Schedulers are to adhere to Kronos Business Rule KRXX-Kronos Schedules and can also refer to Kronos Online Help – Schedules for additional information.

Overtime Implications

Adopting an alternative or "flex" schedule may have overtime implications, depending on whether an employee is in an exempt or non-exempt class. Employees and supervisors need to be aware of these implications as they impact compensation and FLSA and/or Non-FLSA accruals. The table below provides a summary of the overtime implications for the various alternative work schedules.

Schedule Type	Example	Overtime Implications*
9/8/80	**Week 1:** Mon – Thurs: 9 hrs; Fri: 8 hrs **Week 2:** Mon – Thurs: 9 hrs; Fri: Off Day	**Exempt Classes:** Hours worked beyond biweekly schedule is compensated as Basic Overtime.* Compensatory time is accrued in the Non-FLSA accrual bucket.** **Non-Exempt Classes:** Not applicable; employees are ineligible for this schedule.
4/10	**Week 1:** Tue – Fri: 10 hrs **Week 2:** Tue – Fri: 10 hrs	**Exempt Classes:** Hours worked beyond biweekly schedule is compensated as Basic Overtime. Compensatory time is accrued in the Non-FLSA accrual bucket. **Non-Exempt Classes:** Hours worked beyond regular weekly schedule is compensated as Premium Overtime*** after employee has met the "40 hours worked" threshold for the week. Compensatory time is accrued in the FLSA accrual bucket.
4/9 & 1/4	**Week 1:** Mon – Thurs: 9 hrs; Fri: 4 hrs **Week 2:** Mon – Thurs: 9 hrs;	**Exempt Classes:** Hours worked beyond regular schedule is compensated as Basic Overtime. Compensatory time is accrued in the Non-FLSA accrual bucket.

Schedule Type	Example	Overtime Implications*
	Fri: 4 hrs	**Non-Exempt Classes:** Hours worked beyond regular weekly schedule is compensated as Premium Overtime after employee has met the "40 hours worked" threshold for the week. Compensatory time is accrued in the FLSA accrual bucket.

**Basic Overtime = straight cash or compensatory time off;*
*** Unclassified management classifications are ineligible for overtime compensation.*
**** Premium Overtime = time and one half cash or compensatory time off.*

Holiday Compensation Implications

Adopting an alternative or "flex" schedule may have holiday compensation implications. Employees and supervisors need to be aware of these implications as they impact compensation and accrual of FLSA and/or Non-FLSA accruals. The table below provides a summary of holiday compensation implications for the various alternative work schedules.

Schedule Type	Example	Holiday Implications*	Hours Worked on Holiday
9/8/80	**Week 1:** Mon – Thurs: 9 hrs; Fri: 8 hrs **Week 2:** Mon – Thurs: 9 hrs; Fri: Off Day	**HOL falls on scheduled day off** – System credits Non-FLSA accrual bucket with hours equal to 1/10th of the employees' authorized biweekly hours. The credited hours do not expire and can be used at a later time. **HOL falls on scheduled work day –** System credits Non-FLSA accrual bucket with hours equal to 1/10th of the employees' authorized biweekly hours and inserts a HOL pay code edit on the day of the holiday in the amount equal to the employe's scheduled hours, but no greater than 1/10th of their biweekly hours. If HOL falls on a 9-hr day, employees need to make up the difference to complete their schedule with time off (paid or unpaid) or hours worked.	**HOL falls on schedule day off** – Hours Worked will be compensated holiday overtime**. **HOL falls on schedule work day** – Hours Worked will be compensated at holiday overtime**. If HOL falls on a 9-hr day, employees need to make up the difference to complete their 9-hr schedule before holiday overtime compensation is applied.
4/10	**Week 1:** Tue – Fri: 10 hrs **Week 2:** Tue – Fri: 10 hrs	**HOL falls on scheduled day off** – System credits Non-FLSA accrual bucket with hours equal to 1/10th of the employees' authorized biweekly hours. The credited hours do not expire and can be used at a later time. **HOL falls on scheduled work day –** System credits Non-FLSA bucket with hours equal to 1/10th of the employees' authorized biweekly hours and insert a HOL pay code edit on the day of the holiday in the amount equal to the employe's scheduled hours, but no greater than 1/10th of their biweekly hours. Employees need to make up the difference to complete their 10-hr schedule with time off (paid or unpaid) or hours worked.	**HOL falls on schedule day off** – Hours Worked will be compensated at holiday overtime**. **HOL falls on schedule work day** – Hours Worked will be compensated at holiday overtime** after employees make up the difference to complete their 10-hr schedule.
4/9 & 1/4	**Week 1:** Mon – Thurs: 9 hrs; Fri: 4 hrs **Week 2:** Mon – Thurs: 9 hrs;	**HOL falls on scheduled day off** – System credits Non-FLSA accrual bucket with hours equal to 1/10th of the employees' authorized biweekly hours. The credited hours do not expire and can be used at a later time. **HOL falls on scheduled work day –** System credits Non-	**HOL falls on schedule day off** – Hours Worked will be compensated at holiday overtime**. **HOL falls on schedule work day** – Hours Worked will be compensated at holiday overtime**. If HOL falls on a 9-hr day, employees needs to make up the

Schedule Type	Example	Holiday Implications*	Hours Worked on Holiday
	Fri: 4 hrs	FLSA accrual bucket with hours equal to 1/10th of the employees' authorized biweekly hours and inserts a HOL pay code edit on the day of the holiday in the amount equal to the employe's scheduled hours, but no greater than 1/10th of their biweekly hours. If HOL falls on 9-hr day, employees need to make up the difference to complete their 9-hr schedule with time off (paid or unpaid) or hours worked. If HOL falls on 4-hr day, the excess hours remains in the Non-FLSA bucket. The credited hours do not expire and can be used at a later time.	difference to complete their 9-hr schedule before holiday overtime compensation is applied.

**The Non-FLSA accrual has a maximum limit and is not subject to any paydown.*
***Refer to the Compensation Ordinance for Holiday Overtime Compensation.*

The table below provides a summary of how scheduled hours are accounted for on a holiday for employees who are on an Alternative or "flex" work schedule. **Note:** The table is based on an employee who is authorized 80 hours biweekly.

Scheduled Hours on HOL	Holiday Credit	Holiday Off /Taken Posted	Hours Needed to Complete Schedule*	Non-FLSA Comp Balance Accrued (for later use)
10	8	8	2	0
4	8	4	0	4
8	8	8	0	0
9	8	8	1	0

*To complete his/her schedule, an employee can use paid leave or hours worked based on what is agreed upon with his/her supervisor.

Related Policies and Business Rules

Kronos Business Rule v 6.0 – KR-XXX-Kronos Schedules (http://cww.co.san-diego.ca.us/erp/busrulestc.html)

Memorandum of Agreements

Compensation Ordinance – Article 1.5 (Section 1.5.1) Work Periods

Compensation Ordinance – Article 1.5 (Section 1.5.2) Compensation for Working on Holidays

Compensation Ordinance – Article 1.6 (Section 1.6.2) Overtime and FLSA/Non-FLSA Compensatory Time

IT Toolkit

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Introduction

Technology plays an important role in Government Without Walls (GWOW). Leveraging technology in a positive way can enable many of the essential activities for mobile workers, teleworkers, and their co-workers. If not done well, technology can also create difficult and frustrating barriers.

Technology is constantly changing and new capabilities emerge along the way. It is our goal to evaluate new technology, adopt an appropriate amount of new technology that adds value in our work, and ensure excellent support of the technology that we deploy. Each technology typically goes through a predictable lifecycle of evaluation, adoption, deployment, support, and eventually retirement or upgrade. Trying to adopt too many technologies can be overwhelming and counterproductive, but adopting too few can be restrictive and result in lost opportunities.

This Toolkit is intended to provide important information about various technologies that may be useful to employees who work alternative schedules or at alternative locations. Due to the rapid changes in the technology environment, we will publish updates on a regular basis in order to keep this information current and accurate.

Latest updates include:

12/31/2010 Initial publication

Encrypted Flash Drive

A flash drive (or 'thumb' drive) is a small data storage device that connects to your computer. You can upload or download data files, allowing you to carry your data with you and connect to a computer in another location.

A problem with flash drives is that they are easy to lose or steal, due to their small size. To mitigate the risk of losing sensitive data, you can use an encrypted flash drive. On these devices, the data is stored in an encrypted state, making it impossible for anyone to get that data without the password.

Examples of items appropriate for encrypted storage might include:

- Documents that you want to access at a different location (e.g., at home)
- Presentations that you want to take to an offsite meeting

County policy does not allow having County data stored on home computers, but using an encrypted flash drive on a home machine is permitted. You can perform updates, then save back to the flash drive, and the data is never 'stored' on the home computer.

The encrypted flash drive can be ordered through myRequests as a Hardware Catalog order.
(Full description is: Flash Drive - Full Encryption 4GB DISKGO Security Guardian USB 2.0 256BIT.)

Live Meeting

See 'Web Conferencing.'

Mobility VPN

Mobility VPN is a new offering for the County, allowing improved connectivity (through 'persistence') for mobile workers. This Mobility VPN account utilizes a software product from NetMotion.

Your service provider does not change. If you are on Verizon, you stay on Verizon. What changes is the ability to remain connected as you switch between cell towers of your selected service provider. As your location changes (e.g., while driving), NetMotion continually finds the best available connection (based on speed) between your service provider and wi-fi networks. It switches without any interruption to your connection. Even if you travel through an area where no service is available, the software uses its own cache to keep your session (e.g., application data) and simulate the connection to the County. When it finds an available connection, it updates and synchronizes with the County network applications, without you even realizing that there was a gap.

The County performed pilots with NetMotion among various mobile workers (e.g., inspectors) and the satisfaction rate was very high. Instead of multiple interruptions, requiring restarting and/or logging in again, the users can log in once and maintain their connection throughout the day.

NetMotion is ONLY available on County assets maintained by NG. If you need to connect from your home computer or any other device, you must use standard VPN services.

Orders for Mobility VPN can be placed through myRequests using a CSRF.

NetMotion

See 'Mobility VPN.'

OCS (Office Communications Server)

OCS (Office Communications Server, or sometimes Office Communication Services) is an enterprise suite of communications products, implemented to simplify and integrate all forms of communications for County business by enabling the convergence of voice, video, email, desktop presence, mobile desktop and mobile devices. OCS is also a productivity enabler, saving time and reducing the need for travel, while allowing the County to be 'greener.'

Whether you prefer instant messaging, audio, or video, it is all available in one application. Start an instant messaging conversation with a colleague, invite more people to the conversation, switch to voice, or add video with simple one-click actions.

Also, with the new desktop sharing capability (see 'Web Conferencing'), you can easily collaborate with your colleagues and team members.

Requests for OCS are made through the myRequests system as an IMAR.

Phones – Smartphone, BlackBerry

A Smartphone is a mobile phone that offers more advanced computing ability and connectivity than a contemporary basic feature phone. Smartphones may be thought of as handheld computers integrated within a mobile telephone. In addition to running applications based on platforms such as Java ME, a smartphone also allows the user to install and run more advanced applications based on a specific platform.

Although there are many styles of smartphone available on the market today, the County uses the BlackBerry device to connect to the e-mail system using the BlackBerry Enterprise Services (BES) server located in our Plano Data Center. Currently the iPhone, Android, and other Windows-based smartphone devices are not compatible or approved as standards for connecting to our e-mail system or be used to condicy County business, store County data or run County applications.

To utilize this BlackBerry service, each department is responsible for purchasing the BlackBerry device and service directly from their chosen service provider (AT&T, Verizon, Sprint). To have the device set up to connect to the County's BES service, the department would enter a CSRF request in myRequests and a technician would come out to assist the user with the initial setup.

Printers

Mobile printing is a generic term for products and services that let people print documents when they're away from a traditional network or local printer. Usually, mobile printing is wireless. It often uses Bluetooth or 802.11 networking to communicate. Some older handheld devices use infrared signals, similar to the signals most TV remote controls use.

All mobile printing options require three components:

- A device that can print documents, whether on its own or with added software
- A way to connect to a printer, usually wirelessly
- A printer

For people who travel extensively, portable printers can be a better option than looking for available printers. These are compact, lightweight and can be both battery operated and wireless. Some portable printers, often used for labels and bar codes, will even fit in a pocket or on a belt.

If you're considering buying a portable printer, be sure to compare the printer's capabilities with what you'll need to print. If you mostly print photographs, consider getting a portable photo printer, which reads directly from a camera or a memory card. Make sure that the printer is compatible with the device and software you want to use.

Check the Online Catalog in myRequests for a number of personal printing device options. They include small thermal type printers to compact inkjet and laser printers that connect wirelessly via Bluetooth or WiFi.

Scanners

Department scanners are widely used, often included in standard copier machines.
For mobile workers, scanning a document is now possible on the road. Mobile scanners are compact and easy to use. Check the Online Catalog in myRequests for a list of available scanners.

Shared Resources

Shared Resources could be anything that a group of people wants to use at different times, such as: conference rooms, projectors, teleconference bridge lines, or conference phones.

Microsoft Outlook gives you the capability to define these Shared Resources as an entity that can be scheduled within Calendar. You can assign rights to people who should be able to reserve the resource, see the calendar of availability, etc.

This can be especially valuable to a group of mobile workers who are interested in using resources (such as bridge numbers) from different locations. Without this coordination, resources may be double-booked or unavailable when you need them.

For more information on Shared Resources, search Outlook Help for 'Resource.'

Since the Resource utilizes an Outlook e-mail account, you can request a new Resource via a CSRF through myRequests. The monthly charge would be the same as a new e-mail account.

Smart Boards

The Smart Board interactive whiteboard is an interactive whiteboard that uses touch detection for user input – e.g., scrolling, right mouse-click – in the same way normal PC input devices, such as a mouse or keyboard, detect input. A projector is used to display a computer's video output on the interactive whiteboard, which then acts as a large touch screen.

The Smart Board typically comes with 4 digital pens, which use digital ink and replace traditional whiteboard markers. The Smart Board interactive whiteboard operates as part of a system that includes the interactive whiteboard, a computer, a projector and white boarding software called Smart Notebook collaborative learning software. The components are connected wirelessly, via USB or serial cables. A projector connected to the computer displays the computer's desktop image on the interactive whiteboard. The interactive whiteboard accepts touch input from a finger, pen or other solid object. Each contact with the Smart Board interactive whiteboard is interpreted as a left-click from the mouse.

For remote workers, you could use a Smart Board in conjunction with Live Meeting, and participants could see the board from any location.

Teleconference Bridge Numbers

Bridge numbers are provided by AT&T for the purpose of holding teleconferences. There is no charge to create a new bridge number. Charges are incurred as the bridge is used, and depends on the length of the call. Charges appear in Chargeback under 'Conference Bridge Calls.' To request a new bridge number, submit a myRequest IMAR and include "New Conference Bridge" in the Description.

Unified Communications

Unified Communications is the integration of multiple real-time communication services. There are many technical components, but the ultimate vision is an environment where any type of worker can access any application over any public or County owned wired or wireless medium using a wired or wireless end user device.

Several projects have already been funded which will address major components of the Unified Communications strategy. These include the implementation of a new client image on desktops and laptops (Windows 7 and Microsoft Office 2010) and an upgrade to the Microsoft Exchange and SharePoint Applications to version 2010.

Various other related initiatives are being considered for FY 2011-2012 funding.

Web Conferencing

Web Conferencing is used to conduct live meetings, training, or presentations via the network. Live Meeting is a software product from Microsoft that allows users to schedule through Outlook or ad-hoc as well as participate in meetings using their desktop computers from various locations throughout the County. The host can choose to share a particular presentation or their entire desktop or allow other participants to present information. Participants see what is being shared in real time, including changes that you might make during the meeting. Other features include chat and instant messaging to all participants or privately.

Possible uses include:

- Giving a presentation while sharing the PowerPoint
- Conducting a working meeting while sharing the meeting minutes as they are being written
- Conducting a brainstorming session while the ideas are being captured
- Conducting a training session for an application while the trainer is using the application online
- Collaborating in a whiteboard session, possibly with a drawing tool such as Visio
- Editing a document together in real time (e.g., in Microsoft Word)

The host can even turn control over to selected participants so they can be providing updates.

You may be familiar with another product called WebEx. The products are very similar in features, but WebEx is purchased based on usage, so extensive use can get expensive. Live Meeting is part of our Microsoft Office Suite and there is no additional cost for usage.

WebMail

WebMail is an e-mail offering that allows you to access your e-mail from any location by using a web browser. The interface looks similar enough to Outlook that it is fairly easy to navigate through basic functions.

To access County e-mail, enter the URL: https://webmail.sdcounty.ca.gov. You will receive a login screen where you can use your standard LAN Username and Password, just like if you were logging in at your desk.

You can also access your Outlook Calendar in the same way.

This can be especially useful for setting Out-of-Office Auto-Replies if you are unexpectedly absent from the office (e.g., calling in sick). Many people don't have VPN access to the County network from home, but WebMail allows them full access to their e-mail and calendar.

Wireless Conference Phones

Wireless conference phones, such as the Polycom® SoundStation2W™, allow greater flexibility for holding teleconferences. The base station connects to an analog phone line, which connects wirelessly with the conference phone. The phone can be used in any office or meeting room within range of the base station. It may also be connected to a cell phone.

The Top Ten Strategies For Managers Of Mobile Workers:

Surviving and Thriving in the Emerging Mobile Workforce

Terrence L. Gargiulo, President, makingstories.net

makingstories.net

We are an Organizational Development firm specializing in using stories to galvanize your organization.

Where Are We Today?

CIRCA 1980

The hall erupted in a sea of applause. James made his way to the front of the ballroom. Waiting to shake his hand and give him the esteemed Outstanding Corporate Citizen Award for 37 years of service was the CEO of Typical Enterprises.

James Gander was proud to be a third-generation employee. His father and grandfather had worked in the same facility. He would have never guessed that a high school summer job filling bins on a production line would have turned into his current position as an Account Services Manager. Sure, he had seen changes. Assembly had replaced manufacturing, and quality and service had become the cornerstone of the company's competitive advantage, but for the most part James had worked with the same group of people. Typical Enterprises was as much a part of James' family as his six grandchildren.

CIRCA 2010

Cecilia rubbed her eyes. Getting up at three in the morning for a conference call halfway around the world was never in her job description. It had been days since she had actually seen or talked in person with any of the fifty people on her staff. As she typed in the web address of the virtual meeting she saw an instant message pop up.

Tony who had just joined her team six months ago was texting her his official two-weeks notice. Since he was based in Australia and Cecilia worked in Palo Alto, he had notified Human Resources on Monday (Sunday for Cecilia) that he would be leaving. Cecilia thought it was considerate of Tony to text her before the meeting so she would not be blind-sided. She was excited Tony would get a chance to try his hand at a new career. At least she had thirty seconds to collect her thoughts before announcing the information to her team. Days like this made Cecilia wish she could just crawl back into bed. Then she remembered that today she was telecommuting, so at least she could surround herself with the comforts of her home as she prepared to tackle whatever onslaught of fires was sure to come her way.

However disorienting and maddening the pace and rules of our contemporary work life may be, let's understand a few things: there's no turning back, it doesn't have to be a bad thing, and there are things you can do to set yourself up for success even in the face of all the challenges.

Our approach in this white paper will be to tackle the challenges head on. This is not a Pollyanna attempt to convince you of things you already know. Life in organizations is different.

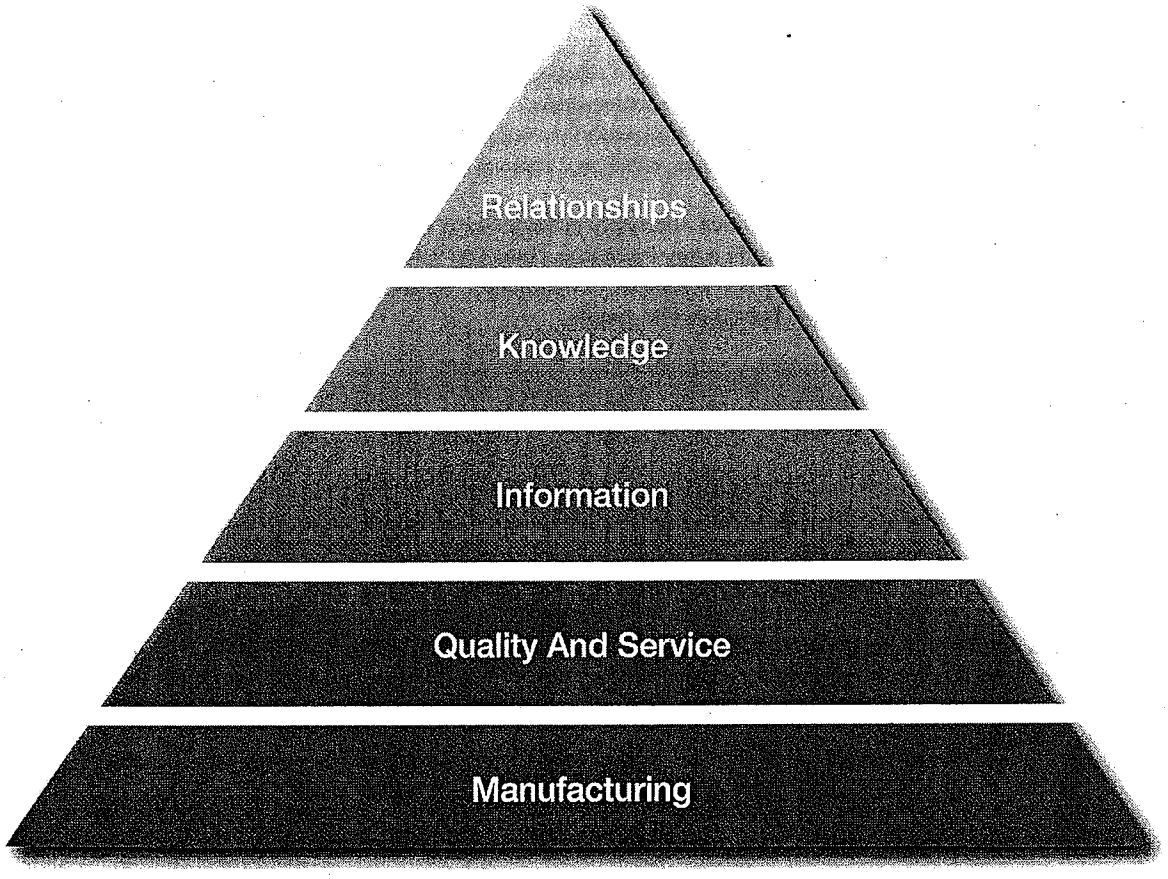
Background

As the authors Christopher Locke, Rick Levine, Doc Searls, and David Weinberger pointed out in their classic book *Clue Train Manifesto*, the boundaries of an organization have become porous. Today's organizations are part of elaborate interdependent networks of suppliers, partners, vendors, and migrant employees. Forget about the gentle notion of touch points with customers; organizations are bombarded with meteoritic impacts of a social and economic variety. There are no institutional walls to protect the inner sanctity of organizational practices. According to the authors, this has led to an acceleration of emergent and "smart" markets that in many cases have outpaced the adaptive capacity of organizations. In other words, the speed of information and the number of interactions between people has made many of our old organizational sense and respond tactics obsolete. By the time we measure or capture the information we need to inform organizational strategy, things have

already changed. Our organizational identities are fragile. Even chameleons and camouflaging octopi are not this sensitive.

Examining factors leading to competitive advantage over time provides insights into some of the major drivers of organizational transformations.

FIGURE 1



Each step on this pyramid represents a major shift in the competitive advantage of an organization. Going back to the turn of the century, economies of scale and manufacturing led to price advantages. When price was equalized in the market, quality and service became the new differentiators. Producing widgets with fewer defects and/or providing value-added services to enhance an enterprises' product offering allowed them to compete more effectively.

The explosion of information technology led to the central role of data in an enterprise. Collecting, disseminating, and managing data in cost-effective ways, aligned with continuous improvement of an organization's business processes, were key measures of viability and growth. Information technology became a critical success factor in evaluating organizations. Organizations unable to leverage automation and information technology to reduce costs and realize new opportunities were at a huge disadvantage.

The next phase of competitive organizational evolution revolved around knowledge. This has been elusive, partly because knowledge in essence is unstructured data. Unlike the 0s and 1s of this document that can be digitally stored as one self-contained document, knowledge sits in the minds and experiences of people. Therefore,

it neither lends itself to being easily packaged and stored in centralized repositories nor can it be marked up with metadata (the data that label and describes the data stored in the repositories). There are some excellent examples of enterprises that have learned how to tap into knowledge to spur innovation and create competitive advantage. Design industries offer excellent examples. Through math-based, knowledge driven CAD/CAM (computer aided design, computer aided manufacturing) initiatives automotive manufacturers have been able to significantly reduce design time cycles, costs of producing prototypes, and increases in safety. In these cases the information technology paradigm morphed well to match these data-driven knowledge opportunities. The short tenure of actionable knowledge strategies is less a function of failure and more an indicator of exciting times that lie ahead.

Cultivating and nurturing a complex and rich collection of relationships is paramount to success. In the future, employees will create value through interconnected relationships. These relationships will need to be capable of and organizationally empowered to synthesize information in real time to fabricate new products, services, information, or relationships to respond to real-time, emergent market needs.

Unlike some of its predecessors, this competitive necessity is happening at blistering speeds. An exponential increase in mobile workers around the world is a key indicator. This is a "make or break" shift organizations will need to embrace. As Plato said, "Necessity is the mother of invention." Strategies for managing relationships with a mobile workforce are one of the central topics of this paper.

According to IDC...

- U.S. mobile workforce expected to grow to 73% of total U.S. workforce in 2011
- Across the world 30.4% of the workforce will be mobile in 2011

* Source: IDC, Worldwide mobile worker population 2007-2011 forecast, Doc # 209813, December 2007.

The statistics paint a sobering yet dynamic picture. A mobile workforce will be the norm not the exception. "Mobile worker" can be a catch-all phrase for many different ways of understanding the changes in the workplace. Each of these has implications for how we approach our role as managers. Let's take a quick peek at some of these nuances:

TABLE 1

INTER (Between Organizations)		*INTRA* (Within Organizations)	
Companies	People work for many different companies.	Teams	People work on multiple teams. Reporting structures may remain hierarchical but actual day-to-day working relationships are matrixed.
Jobs	People change jobs with much greater frequency.	Locations	People change job sites and working locations with greater frequency.
Careers	People acquire additional skills and experiences to enter new fields, industries and professions.	Projects	People move from project to project even before one is completed.
PHYSICAL EXAMPLES OF MOBILITY			
Telecommuting	People work out of home offices or other satellite spaces.		
Non-Co-located	People manage and work with more people who are not in the same location – in some case not even the same country.		
Vendors & Partners	People manage increasingly complex and constantly changing chains of vendors and partners to perform the work necessary to fulfill their job responsibilities.		

The IDC statistics on mobile workers focus on telecommuters, virtual teams, and non co-located workers. This paper also focuses on these three common categories of mobile workers. Being mindful of all the ways we have become more mobile will help us be more effective at managing all of our work relationships.

The Manager's Perspective

The pace of change has accelerated. First the good news: If this realization is creating concerns for you and your organization, you're not alone. According to the Institute for Corporate Productivity (i4cp), "a huge majority of companies foresee an increasing use of virtual teams in the coming years, and more than a third of managers are worried about the development." Outside of work employees are spending more time interacting with each

other using the tools of mobile work (i.e., cell phone, mobile computing platforms, social media websites, Web conferencing, Wiki's, etc.). The balance between work and personal time is dynamic. The standard 9-5 day job is rare. We live our lives switched on and plugged in. This creates an expectation. People expect work to support a more fluid style of life.

Now, the bad news: If you can't see it, monitor it, or measure it, how do you manage it? Notice the word "it." As managers, much of our work is object-based. We interact with people to get "it," done. Although people are needed to do the work, managers' performances are measured by the output of people who work with them. Do you remember the classic opening scene in Charlie Chaplin's silent film *Modern Times*? In the scene Charlie Chaplin is working on an assembly line. When management decides to increase productivity by installing eating machines, Charlie is the lucky guinea pig. Charlie's experiment is a fiasco — imagine food flying all over the place. This caricature illustrates a vital truism. Managers must maximize the performance of employees to help the organization achieve its objectives.

How do mobile workers impact our management practices? In the next three sections we will look at the benefits of mobile workers for managers, the challenges of managing them, and strategies for success.

According to Nemertes...

- Nemertes estimates that the number of virtual workers has increased by 800 percent within the last 5 years.
- 60 to 70 percent of all employees work in locations different from their supervisors.

http://www.nemertes.com/

Benefits

We may need to embrace the cliché, "If you can't beat them, join them." Knowing the benefits of managing mobile workers counter-balances the risks and challenges. Here are some positives to consider:

- Broader Range of Influence

  As a manager of non co-located employees, your reach inside an organization increases. Working with employees in various offices, branches, and locations gives you access to people and information in these places. You acquire another set of eyes, ears, and hands. This works as a benefit to you in two ways. First, your scope of influence is expanded. Your initiatives, priorities, and needs around resources and political support gain a wider audience. Second, your intelligence and ability to understand dynamics shaping your organization's strategy and decisions is increased. Mobile workers expand your scope of influence by sharing information and their perspectives while acting as a potential mouthpieces and advocates for your agendas.

- Larger, More Diverse Teams

  Mobile workers can give you access to a wider range of talents, knowledge, and experiences. Since work becomes more project- and team-based, you may find yourself with a revolving door of diverse talents that might otherwise remain unavailable to you. Mobile work naturally encourages greater cross-pollination

of functional areas. The size and quality of your network directly affects your effectiveness in today's organizations. Diversity is not a luxury — it's a must-have strategic tool that needs to be cultivated. Mobile workers can infuse homogenous sub-cultures of your physical sites, functional areas, or long-standing teams with fresh ideas and innovative practices.

- Motivated Employees

Today's employees want flexibility. Organizations that support mobile workers see increases in their recruitment and retention numbers. Barring the challenges of isolation and communication which we will discuss in a moment, the vast majority of employees, especially the younger generation, are more motivated in a flexible, mobile working environment than a traditional one. Engaged employees are committed employees. Compliance is not enough. The speed of business demands that workers, whether they are transient or stable, feel personal commitments to their performance goals and see and understand the link between these goals and the organization's bottom line imperatives. Success as a manager rests on the shoulders of motivated employees. Offering flexible working options to employees whenever possible will contribute to the motivation of your employees and the success of your organization.

- Decrease in Transactional Oversight

Mobile workers shift managers' attention from activities to deliverables. Day-to-day oversight of tasks is difficult with remote workers. This can be tough for detail-oriented managers who thrive on tightly coordinated and orchestrated workflow routines and interactions with employees. A transactional approach with remote employee is not sustainable and may lead to rapid dissatisfaction and frustration of both employees and managers. However, for many managers, even ones with a more detail-oriented management style, a decrease in transactional oversight has meant more time to focus their energies in new directions.

- Increase in Strategic Bandwidth

Less time spent overseeing employees' activities means more time to be strategic. Managers can be proactive instead of reactive. When managers are freed from the daily minutia they can spend more time crafting new visions, building political support for important initiatives, and expanding their social networks. All of these things increase managers' value to the organizations. Future competitiveness depends on this shift. Organizational cultures that impede their managers from assuming more strategic roles will lose market share and eventually become extinct. The rise of mobile workers is catalyzing these mission-critical changes.

- Collaborative Relationships with Authority

Mobile workers thrive with collaborative relationships. The exigencies of managing mobile workers lead to the adoption of more dynamic styles of communication and interaction. On the other hand, distance works as a buffer. Overly collaborative relationships, if not managed well, can erode authority and make dissension more difficult. In this way, managers get the best of both worlds. Managers can maintain their authority while being more collegial. This balance works extremely well with most workers. They enjoy the interaction and respect inherent in collaboration and also benefit from boundaries and structures generated by a manager's positional power. There are anecdotal reports of difficult manager/employee relationships improving as a result of increased distance and changes in the interactive dynamics.

Challenges

Painting a rosy picture of mobile workers without examining some of the risks and challenges would be irresponsible. Risk and benefits are often closely related. A benefit for one manager may be a risk for another. In the next two sections we look at a few of the risks and challenges associated with mobile workers.

- Potential Decrease in Productivity

  Fears abound on this one. Can someone really work at home and be productive? What about all of the distractions? Then there are moments in projects or employees' job responsibilities that require tight synchronization that is next to impossible to coordinate with the separation of distance and or time. If Cindy takes thirty minutes in the middle of her day to do yoga will that make her less productive? Opinions may vary but from Cindy's perspective the answer is obvious. As long as people do not abuse the flexibility extended to them and we design workflows that support mobile workers, this concern of a decrease in workers' productivity may be more irrational than many of us want to admit. Tied to loss of productivity is a deeper and more difficult issue: the loss of control and oversight. If you are migrating from a traditional workforce to a mobile one, you undoubtedly are reinventing your job as a manager. What you managed before was concrete. What you manage now is less tangible. This is not trivial. Essentially, managers are faced with no longer knowing how to do their jobs. Managers know their business but they are foreigners in an alien world of work. Well-designed workflows can mitigate some of these issues. Managers also need to reengineer their jobs and negotiate new performance management metrics with their bosses. Most of all, managers need to be patient with themselves and others. Mobile workers change the way we manage. It takes time to sort out all the rules of a new game and their implications.

- Influence Replaces Positional Power

  Positional power exerts less influence with mobile workers. Without the daily four walls of an organization, remote workers are unlikely to perform their jobs in prescribed ways. Managers need strong influence skills. Since influence skills are relational in nature it takes to time cultivate the trust and interpersonal connections associated with them. Time is not always on our side. Lapses in management styles that revert to more coercive techniques may achieve short-term objectives but ruin managers' chances of building strong two-way influential relationships with employees. There are no short cuts and the amount of energy and creativity it takes to cultivate influence with remote workers is one of the most difficult aspects of managing mobile workers.

- Fragile Project Dependencies

  Coordinating deliverables with offsite employees, contractors, vendors, and partners is a risk familiar to all project managers. These risks need to be identified at the front end of a project and managed throughout its life cycle. As a general rule, the greater the number of dependencies assigned to resources less in your direct control, the larger your contingencies need to be. Even non-project-related work will naturally be prone to more delays with mobile workers. In both of these instances central project management can be subdivided into smaller areas of ownership. Create informal subgroupings around clusters of resources tied to a deliverable. This gives autonomy and increased flexibility to the people most affected by project dependencies.

- Information Sharing

  The reduction of face-to-face interactions hampers information sharing. Many organizations are culturally challenged when it comes to sharing information. Isolation experienced by mobile workers compounds these tendencies. Technology can play a powerful role in addressing these challenges and can even nudge cultures towards more information-sharing practices.

Top Ten Strategies for Managers of Mobile Workers

Given our discussion of benefits, risks, and challenges associated with managing a mobile workforce, here are ten strategies:

1. **Focus on building relationships.**	You are now in the business of managing relationships. Once a quarter audit your time. How much time are you spending engaged in activities meant to foster stronger relationships with your mobile employees? Rate each relationship on a scale of 1 to 10 where 1 is weak and 10 is very strong. Craft a strategy for continuing to develop your strong ones and triage the weak ones. Ask yourself why they are weak and what you can learn from them. Avoid finger pointing and hold up the mirror to reflect on your own opportunities for improvement. Extreme cases of under-performance do not warrant time or effort. These however are few and far between.
2. **Streamline communications.**	Consolidate and prioritize communications. Use email and IM (instant message), texting, blogging, threaded discussions, etc. for relationship-driven communications (i.e., staying in touch and being personal). Communications of an important nature should be cohesive and never delivered in fragmentary pieces that have to be cobbled together by the receiver. Mutually assess the communication preferences of yourself and your team members to develop a communication plan. Avoid assumptions and revisit your plan on a regularly basis especially when the nature of the work is about to change.
3. **Incorporate less didactic forms of communications.**	Determining the right amount of detail and when to provide detail is an ongoing responsibility of a manager with a mobile worker. As a general rule, less is more. This leaves bandwidth for the times when lengthy, explicit instructions and information are essential for the work at hand. Try working with more story-based forms of communications. Sharing tidbits from the field and office in the form of stories, anecdotes, case studies (use cases), jokes, innocent productive gossip, and even metaphors will relay context, encode key pieces of information, and give mobile workers a sense of inclusion.
4. **Spend more time listening.**	Obvious, but counterintuitive. When you are out of easy reach and you are tasked with managing the performance of others it's easy to get sucked into the trap of needing to transmit lots of information. In most cases the opposite is what is most productive. Make listening a priority. This is the hardest and most tiring aspect of managing others. It is also the single most important thing you can do accelerate the development of strong relationships. Listening is not enough. Keep an open mind. Be present and try to enter the perspective of the speaker. This will help you ask effective questions and identify what direction to go with your own needs and agenda. You'll be surprised at what emerges.

5. **Let mobile workers define communication and reporting practices they want to follow.**	Structure is critical. Adopt rules of engagement that place people at the center of their own decisions. Managers provide the boundaries and constraints but let employees define the working and communication styles, tools, and processes that will help them perform at the best. Set expectations on two fronts. First, treat these employees' defined practices as privileges that can and will be modified if key performance metrics are not hit. Second, let employees know there will be times when a projects or work require less flexible, employee-driven communication and reporting practices.
6. **Manage deliverables not activities.**	Lots of project-oriented work is well suited to mobile workers. Even roles that are more task driven can be effectively managed if they are broken into deliverables. For mobile workers this may mean collapsing some of the activities of a business process or workflow that had manual checkpoints and controls associated with them into deliverables. Automation where possible can be used or batching activities into larger groups can transform task oriented jobs into deliverables. Realize that there can be many facets of people's jobs that need to be adjusted to accommodate a mobile work style.
7. **Engage in more frequent and informal performance management activities.**	When you manage mobile workers, relationships are at the heart of your job. Performance management does not need to be a loathsome, "*administrivia*" obligation. Designing some unstructured, informal ongoing dialogs with mobile employees about their performance goals and personal development plans is a great way to strengthen communications, and shows an active interest in employees and relationships. This might look and feel very different from one employee to the next. This is another tangible way managers can adapt their style to match the needs and preferences of employees. It works best when the performance management conversation flows in both directions.
8. **Give complete trust until given a concrete behavioral reason to do otherwise.**	According to a recent survey conduct by HR.com and ic4p, listening and trust are the two most important factors to virtual and remote teams. Without trust, relationships are bankrupt. Abuses of trust can always be found but these occur in spite of whatever systems we put in place. Mobile workers thrive when managers give them complete trust. In some respects managers of mobile workers have no other choice. Use trust to create strong relationships. When some concrete behavior and not just someone else's word of mouth shows that trust has been violated, then take it away, but not until then.
9. **Use adaptive management styles tailored to individual workers.**	Every employee is different. Mobile workers make it easier for managers to take a more personalized approach in how they work and interact with members of their team. It takes more work and effort on a manager's part but the results can be phenomenal. Understanding what enables each employee to perform at his or her best is the most important responsibility of a manager.

10. Leverage technology.	Technology drives and supports managing mobile workers. Using technology well is not as simple as it appears. Standard models of communication and transaction should not always be mapped in a simple one-to-one way. Communication and collaboration technologies offer new and exciting models. These need to be purposely exploited in order for organizations to realize the full extent of benefits these wonderful new capabilities and features offer. Beyond email, IM and phone, Web conferencing plays a key role in virtual team enablement. Take an inventory of "stuff" you need to collaborate on with your virtual team. If the list includes Word docs, spreadsheets, software applications, or anything else on your desktop, Web conferencing will be critical for collaborating in real time. You're projects will lag if you can't be on the same page with mobile workers.

About the Author

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