

**RESOLUTION NO.**

**35437**

**Approve and adopt the City of Portland Telework Guidelines for non-represented employees.**

WHEREAS, the Portland metro area currently fails to meet Federal health-based air quality standards for ground level ozone (smog) and carbon monoxide Motor vehicle emissions are the primary cause of the region's air pollution and are projected to increase with the addition of 500,000 - 750,000 people by 2010

WHEREAS, motor vehicles are the primary source of carbon dioxide (CO<sub>2</sub>) emissions, a primary greenhouse gas, in the Portland region And, Portland's 1993 Carbon Dioxide Reduction Strategy outlines objectives to reduce CO<sub>2</sub> emissions 20 percent below 1988 levels by 2010

WHEREAS, the 1993 CO<sub>2</sub> Reduction Strategy has an objective of reducing vehicle miles traveled per capita to 10 percent below 1995 levels by 2010

WHEREAS, the Oregon Transportation Planning Rule for Goal 12 of the state Land Use Goals and Policies requires urban areas to reduce per capita vehicle miles traveled by 20 percent over the next 30 years and reduce per capita parking spaces by 10 percent over the same period

WHEREAS, the 1990 City Energy Policy directs the City to increase energy efficiency by 10 percent in all sectors of the City by the year 2000 And, the Energy Policy Telecommunications Objective includes an action item to develop a telecommuting policy and investigate opportunities for City employees to work off-site and telecommute

WHEREAS, several City policies and plans, including the Future Focus Strategic Plan, the Reclaiming Our Streets Community Action Plan, and the Comprehensive Plan call for the City to encourage the use of alternatives to the automobile.

WHEREAS, the City conducted a telework pilot involving 30 employees representing 11 bureaus from June 1994 - January 1995 Supervisors and participants were pleased with the telework arrangement, reporting increases in productivity and reductions in auto trips Teleworkers liked the telework experience and most have continued to telework one or more days/week

# CITY OF PORTLAND TELEWORK GUIDELINES

## INTRODUCTION

Telework is a management tool that may be used to increase productivity, reduce employee commute trips, and accommodate special needs of employees

Telework is not an entitlement, rather, it is one of several work options used at the supervisor's discretion, such as flexible work schedules and job sharing

This option allows work arrangements to be tailored to each manager's or workunit's unique requirements. The City of Portland encourages the use of telework in situations where it will work to the mutual benefit of employees, the City, and the City's customers

These guidelines provide a general framework for teleworkers in all City bureaus and do not attempt to address the special conditions and needs of all individuals. (The authorization agreements may address these issues.)

The intent is to allow City bureaus and their managers discretion in designing their own telework programs. More specific conditions relating to the employee working away from the principle worksite are detailed in the Telework Authorization, which shall be negotiated by the employee and supervisor, subject to manager's approval

## DEFINITIONS

**Regular Office or City Office** means the office to which an employee is generally assigned. The regular office may be a branch office or other City workstation located outside of the downtown business district if the employee is assigned to work at that location without regard to telecommuting considerations

**Regular Office Hours or Core Office Hours** are the agreed-upon, uninterrupted set of hours during the day when the supervisor and co-workers can always communicate with the teleworker

**Telework** means working arrangements in which the workplace is located at least part time at an alternate location, such as an employee's residence, or a satellite office located closer than the regular office to the employee's residence

**Equipment** A telephone with voice mail is often the only equipment needed, however, in some cases employees use the telecommunications technologies offered by personal computers, fax machines, or on-line services such as e-mail

**Telework Arrangements** are those in which an employee works at an alternate location on a regular schedule, avoiding commute trips during normal office hours

**Telework Application** The form that an employee fills out to be considered for a telework arrangement

**Telework Authorization** The form signed by the bureau director, supervisor and employee which enumerates the negotiated conditions of each telework arrangement

## EMPLOYEE ELIGIBILITY

City non-represented permanent employees, not in a trial service or in-training status, are eligible to apply for telework. Approval shall be based generally on the requesting employee meeting all of the following criteria

**Interaction and Scheduling** The nature of the work requires minimal face-to-face interaction, or can be scheduled to permit telework

**Special Materials** There is minimal need for specialized material or equipment

**City Worksite Not Crucial** The employee's job is not dependent upon location of the workplace, and has tasks and deliverables that can be clearly defined and monitored at other than the traditional worksite

**Low Impact on Workgroup.** The employee's absence from the office is not detrimental to the productivity of the work group

**Performance Evaluation** Performance characteristics of the employee should be rated as *expected, commendable* or *superior* in major areas of their most recent Employee Performance Evaluation

## TERMS OF EMPLOYMENT

The teleworker's salary, benefits, responsibilities, professional standards, and promotion opportunities will not change as a result of the telework arrangement

## TELEWORK AUTHORIZATION FORM

A Telework Authorization based on the needs of the City, the employee's bureau, workgroup and job will be signed by the employee and supervisor describing the mutually agreed-upon arrangement

The Authorization will provide a specific understanding of the arrangement and the joint responsibilities for each

**Travel and Overtime.** City Code and Personnel Rules, on leave, hours of work and scheduling work, Fair Labor Standards Act (FLSA) rules on overtime and City travel policies and regulations shall apply to teleworkers



When teleworking, the alternate worksite is the official station for travel expense voucher purposes except that travel to and from the employee's regular City office shall not be a reimbursable expense

For employees in a "scheduled" work period designation, supervisors and teleworking employees must ensure compliance with FLSA and City Code on overtime. Telework shall not be authorized unless compliance is assured

### **PERFORMANCE EVALUATION**

Performance evaluation requirements shall not change, although the supervisor's method of monitoring and evaluating performance may focus more on results that direct observation. Deadlines, goals and objectives must be clearly communicated

### **EMPLOYEE COMPLIANCE**

Employees must comply with all City rules, policies, practices and instructions. Failure to do so may result in removal from the telework program and/or disciplinary action

### **WORKERS COMPENSATION**

**Employee Injuries** The City will have the same responsibility for job-related accidents or injuries to the employee at the alternate worksite that it has at the employee's regular City office

**Family and Visitor Injuries** The City does not assume responsibility for injury to any persons at the employee's residence or alternate workspace within it

### **DISABLED WORKER/RETURN TO WORK**

Supervisors and employees may consider teleworking as a flexible workplace arrangement for assisting disabled workers, or in returning to work those employees on medical leave, or injured on the job and on Workers Compensation

### **COST AND BENEFIT CONSIDERATIONS**

Each telework arrangement should be reviewed for costs and benefits, such as the nature of the job, equipment requirements and expected results

### **WORK HOURS AND ACCESSIBILITY**

**Work Hours and Scheduling** The number of hours worked will not change because of telework. Work hours will be scheduled and any changes must be approved by the supervisor in advance. Also please refer to City Policy

regarding work hours, schedules and Fair Labor Standards Act

**Adequate Time in Office** The amount of time spent teleworking during a work week may vary according to each job, equipment needs and the individual Telework Authorization

Minimally, the telework schedule must allow adequate regular office time for meetings, access to facilities and supplies, and communication with other employees and with customers

**Accessibility** Teleworkers will maintain accessibility to their supervisor, co-workers and customers as agreed upon in the Telework Authorization. A regular, non-interrupted set of daytime hours must be maintained

**Family Care and Duties** While telework may facilitate employees' working around family responsibilities, it is not intended to be a substitute for family care

**Overtime and Leave** Requests to work overtime must receive advance approval, and requests for leave shall be reported and/or approved by the supervisor, in a manner consistent with City policy

**Emergency Excuse From Work** If an office closure or emergency excuses other employees from working and work can proceed at the alternate worksite, teleworkers are not excused from working

However, an employee may be excused from working for an emergency such as a power failure that affects the alternate worksite but not the office, or may be required to report to the regular office

The immediate supervisor must be notified of the emergency and shall excuse the employee or require attendance at the regular office

**Teleworker's Privacy** Only the employee's supervisor or persons authorized by the employee will be provided with a teleworker's home phone number

**Length of Term** The maximum term of a telework arrangement is twelve (12) months, subject to re-authorization

### **COMPUTER EQUIPMENT AND SOFTWARE**

**City Property and Inventory** Hardware or software provided by the City remains the property of the City and shall be returned at the end of the telework arrangement

An equipment/software inventory record for City equipment assigned for off-site use will be maintained by the

teleworker's work unit

Products, documents, and other records used and/or developed while telecommuting shall remain the property of and be available to the City, and are subject to departmental and divisional policies regarding confidentiality and authorized access

Restricted access documents and other materials may not be taken out of the regular City office without prior supervisory approval

**Software** City-owned software may not be duplicated except as formally authorized. Teleworkers using City software must adhere to the manufacturer's licensing agreements

The employee is responsible for protecting the integrity of copyrighted software, and following policies, procedures, and practices related to them to the same extent applicable in the regular office

The employee must take all precautions necessary to avoid contamination of data (for example, by use of unauthorized software that may contain a computer virus)

**CITY COMPUTER SUPPORT**

Support should be provided by the teleworker's bureau, within its priorities, to the extent possible based on the availability of staff, funds, support capacity and other resources

The diverse nature of bureau missions and the variety of information systems employed make it impossible to guarantee that a teleworker can extend needed information system access to the alternate work location

Support services may be provided by Computer Services Division through an interagency service agreement with the teleworker's bureau, by that bureau's own support staff, by outside vendors with which the bureau contracts, by the teleworker, or by a combination of these resources

**Installation.** If the teleworker requires computer support at the alternate work location, the teleworker's bureau, through its selected support provided, should be responsible for installation and configuration of any computer hardware, data communication lines, and software the teleworker requires to perform work

**Repair** If City-owned computer equipment is provided at the alternate work location, the teleworker's bureau, through its selected support provided, should be responsible for its repair. Repair of non-City owned computer equipment will be the responsibility of the teleworker unless specifically provided for in the approved telework arrangement

**VOICE-DATA TELECOMMUNICATIONS**

**General Expenses** Telephone services that are deemed necessary for the employee to do the job will be paid by the City only if specifically approved by the employee's bureau

**Long-Distance Expenses** Teleworkers should use their City calling card when making long distance, work-related voice communications. Long distance charges incurred using other long distance carriers may be reimbursed as stipulated in the Telework Authorization

**CITY PROPERTY USE AND PROTECTION**

**Office Supplies** Supplies necessary to complete assigned work at the alternative worksite should be obtained during one of the teleworker's in-office work periods

**Exclusive Use.** All equipment, software, supplies, or other material purchased or maintained by the City are to be used by the teleworker and only for City business

**Care of Property** The employee has the same responsibility for taking appropriate steps to minimize damage to City property used at the alternate worksite as would exist at the regular City office

**Surge Protection** Surge protectors will be provided by the City and must be used with any City owned computer equipment. The employee will be responsible for damage resulting from a power surge if no surge protector is used

**PERSONAL WORKSPACE EQUIPMENT**

**Purchases** Purchase of home office furniture or equipment (e.g., desks, file cabinets, answering devices, etc.) is the teleworker's responsibility

**Maintenance and Repair** Employees who elect to use their own equipment (not furnished by the City) are responsible for its maintenance and repair

**Damage or Loss** The City assumes no obligation in regard to damage or loss to property owned by the employee at the alternate worksite

**WORKSPACE**

**Adequacy and Safety** The employee is responsible for establishing and maintaining a designated, adequate workspace at the alternate worksite. The employee is responsible for maintaining this space to the same safety and other standards as are applicable at the regular City office

**City Visits** With reasonable notice and at mutually agreed upon times during employee's normal work hours, the City

may make on-site visits for inspection of the workspace to ensure that it is sufficient for the equipment, safe from hazards and/or to install or retrieve City equipment or property. Visits may be made by the employee's supervisor, or anyone designated by the supervisor to make an inspection.

## **COSTS**

**Cost Obligations of the Employee** Teleworkers who have necessary office equipment at the home office are expected to use it.

Individual tax implications, auto/homeowners insurance, and incidental residential utility costs are the responsibility of the employee.

**Cost Obligations of the City** Depending upon the nature of the job and availability of funds, the teleworker's bureau may provide a workstation, model, communications software, job-specific software, and related computer equipment.

## **ADMINISTRATIVE PROCEDURES**

**Employee/Teleworker** The employee should complete a Telework Application and forward it to their immediate supervisor. The employee collaborates with the supervisor to create a mutually suitable Telework Authorization, and signs it if approved by the supervisor.

**Supervisor** The supervisor approves or disapproves the Telework Application form. If disapproved, supervisor discusses this decision with the employee. If approved, supervisor collaborates with the employee to create a mutually suitable Telework Authorization.

Supervisor signs the Telework Authorization and forwards both the Application and Authorization forms to bureau director for approval.

Supervisor coordinates with Computer Services Division or bureau-level technical support regarding estimated cost and needs of the teleworker as well as a time frame for installation.

**Bureau Director** Approves/disapproves Telework Application and Telework Authorization. This includes authorization of costs of telework and processing of orders for necessary equipment. If disapproved, the bureau director gives the supervisor an explanation. If approved, bureau director signs both forms and one copy of each is sent to the teleworker and the supervisor.



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WHEREAS, in March 1995, the Energy Office reported to City Council on the success of the telework pilot project and was directed to develop telework guidelines for use by City supervisors as a management tool

NOW, THEREFORE, BE IT RESOLVED, the Portland Telework Guidelines described in Exhibit A are hereby approved and adopted, and shall be used as a management tool and option for non-represented employees  
The Portland Energy Office will provide technical assistance to bureaus interested in pursuing telework as an alternative work arrangement And, the Bureau of Personnel and Energy Office will investigate opportunities for extending this work option to represented employees

AUG 30 1995

**ADOPTED** by the Council,  
COMMISSIONER MIKE LINDBERG  
Susan Anderson ejk  
August 9 1995

**BARBARA CLARK**  
Auditor of the City of Portland  
By *Britta Olson* Deputy

1432

Agenda No

RESOLUTION NO 35437

Title

Approve and Adopt the City of Portland Telework Guidelines for non-represented employees. (Resolution)

<b>INTRODUCED BY</b>	<b>DATE FILED</b>
Portland Energy Office	AUG 24 1995
<b>NOTED BY COMMISSIONER</b>	Barbara Clark Auditor of the City of Portland
Affairs	By <u>Cory Kershner</u> Deputy
Finance and Administration <i>Vera Hays</i>	For Meeting of _____
Safety	<b>ACTION TAKEN</b>
Utilities <i>Mike D Lindberg for</i>	
Works	
<b>BUREAU APPROVAL</b>	
Bureau Portland Energy Office	
Prepared by <i>SA</i> Date 8-14-95	
Budget Impact Review	
___ Completed <input checked="" type="checkbox"/> Not Required	
Bureau Head <i>S. Anderson</i>	

AGENDA		FOUR-FIFTHS AGENDA	COMMISSIONERS VOTED AS FOLLOWS	
			YEAS	NAYS
Consent	Regular <input checked="" type="checkbox"/>	Blumenauer	<input checked="" type="checkbox"/>	
<b>NOTED BY</b>		Hales	<input checked="" type="checkbox"/>	
City Attorney		Kafoury	<input checked="" type="checkbox"/>	
City Auditor		Lindberg	<input checked="" type="checkbox"/>	
City Engineer		Katz	<input checked="" type="checkbox"/>	