

CITY OF PORTLAND TELEWORK GUIDELINES

**Adopted August, 1995
Resolution #35437
Revised November, 1996
Resolution #**

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. The telework program may be discontinued at any time at the sole discretion of the City.

This option allows work arrangements to be tailored to each manager's or work unit'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 principal 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 teleworking 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 Proposal The memo an employee gives to their supervisor outlining their request 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

Permanent City 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.

Positive Work History The employees' work performance must be rated as at least average through a formal evaluation, if applicable, or by the supervisor when a request to telework is made. Teleworking is not available where there are concerns about an employee's ability to work independently and/or a history of performance or discipline problems.

Clear Objectives In most cases, teleworking will be available only for jobs where clear work objectives can be set, tasks can be clearly defined and results are measurable.

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, Personnel rules, and collective bargaining agreements, 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 than 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

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 and collective bargaining agreements 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. If an employee is excused from work they will be required to use vacation time, compensatory time, or take time without pay

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. It is recommended that the first ninety (90) days under the agreement be a trial period. At the end of the trial period, the immediate supervisor should review the arrangement with the employee and decide whether to continue for the remaining period authorized in the agreement.

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 teleworking 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. Access to the City computer network is limited to City business. For security purposes a password will be installed on the network to limit access to City employees conducting City business. The teleworker must comply with all City or bureau defined security and access restrictions.

Software City-owned software may not be duplicated except as formally authorized. Teleworkers using software for City business 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 install virus protection on their home office computer and 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 the Bureau of Information Services 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 provider, should be responsible for installation and configuration of any computer hardware, data communication lines, and software the teleworker requires to perform work.

Troubleshooting If City-owned computer equipment is provided at the alternate work location, the teleworker's bureau, through its selected support provider, should be responsible for phone support for troubleshooting problems and its repair. Repair of non-City owned computer equipment will be the responsibility of the teleworker unless specifically provided for in the approved Telework Authorization.

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. Consideration for an additional phone line should be made if the employee will be frequently utilizing a remote access network.

Long-Distance Expenses The employee's supervisor may approve long distance telephone calls as stipulated in the Telework Authorization. Teleworkers shall maintain a log of long distance business calls to submit monthly to their supervisor with a copy of their phone bill for reimbursement.

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, modem, communications software, job-specific software, and related computer equipment

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

ADMINISTRATIVE PROCEDURES

Employee/Teleworker The employee should draft a telework proposal outlining their request to telework 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 proposal. 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 telework proposal and Authorization forms to bureau director for approval

Supervisor coordinates with Bureau of Information Services or other 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 proposal 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

The decision to allow an employee to telework is solely within the discretion of the supervisor and bureau director

RESOLUTION NO. 35569

Amend the City of Portland Telework Guidelines adopted by Resolution No. 35564 to clarify the City's ability to discontinue the program. (Resolution)

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 (CO₂) emissions, a primary greenhouse gas, in the Portland region And, Portland's 1993 Carbon Dioxide Reduction Strategy outlines objectives to reduce CO₂ emissions 20 percent below 1988 levels by 2010

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 1993 CO₂ 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 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

WHEREAS, the City Council adopted the City of Portland Telework Guidelines with resolution 35437 on August 30, 1995 for use by City supervisors as a management tool for non-represented employees. The resolution directed the Energy Office and Bureau of Personnel to investigate extending the telecommuting work option to represented employees.

WHEREAS, on November 6, 1996, when adopting resolution 35564 to expand the telework program, the City Council directed the Energy Office to add language to the Portland Telework guidelines clarifying that the City may discontinue the program at any time at its sole discretion.

WHEREAS, the requested language has been added to the second paragraph of the Portland Telework Guidelines.

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 permanent City employees. The Portland Energy Office will provide technical assistance to bureaus interested in pursuing telework as an alternative work arrangement.

COMMISSIONER MIKE LINDBERG
Laura O'Keefe
November 14, 1996

ADOPTED by the Council,

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

1863

Agenda No

RESOLUTION NO.

35569

Title

Amend the City of Portland Telework Guidelines adopted by Resolution No. 35564 to clarify the City's ability to discontinue the program. (Resolution)

INTRODUCED BY	DATE FILED NOV 22 1996
	Barbara Clark Auditor of the City of Portland
NOTED BY COMMISSIONER	
Affairs	By <u>Cay Kershner</u> Deputy
Finance and Administration	
Safety	For Meeting of _____
Utilities <u>MDL (P)</u>	
Works	ACTION TAKEN
BUREAU APPROVAL	
Bureau Energy	
Prepared by Date L O'Keefe 11/14/96	
Budget Impact Review ___ Completed <u>X</u> Not Required	
Bureau Head. <u>Susan Anderson</u>	

AGENDA		FOUR-FIFTHS AGENDA	COMMISSIONERS VOTED AS FOLLOWS		
				YEAS	NAYS
Consent <u>X</u>	Regular	Blumenauer	Blumenauer <u>STEN</u>		
NOTED BY		Hales	Hales		
City Attorney		Kafoury	Kafoury		
City Auditor		Lindberg	Lindberg		
City Engineer		Katz	Katz	✓	