

Administrative Order No. 86 (Revised 04/22/2021)

This order supersedes Administrative Order No. 86 dated 03/13/20

Date: April 26, 2021

To: All City Departments
From: Scott Chadwick, City Manager
Subject: **IMPLEMENTATION OF THE TELECOMMUTING PROGRAM**

PURPOSE:

This program is for positions in which management determines it is operationally feasible to perform the work off-site.

Telecommuting is when employees perform some or all of their usual job duties at a location away from their usual city work locations at a telework site (primarily at home), as established in a Telecommuting Program Agreement. Telecommuting can be done on a regularly scheduled basis or on an occasional, as needed basis approved in advance.

Telecommuting is an optional program, not guaranteed, that may be provided to employees whose job duties management determines do not require physical presence at the permanent work site.

Employees must work at a city worksite at least one or more day(s) a week. The determination of the number of days an employee is eligible to telecommute will be at the management's discretion regardless of job requirements. Management may modify the number or designation of on-site days or terminate the Telecommuting Program Agreement at any time.

POLICY:

This policy contains guidelines and requirements for the City of Carlsbad's Telecommuting Program. Telecommuting may achieve increased productivity, effective use of staff work time, efficient use of resources, enhanced employee engagement and reductions in traffic and greenhouse gas emissions in support of the city's Climate Action Plan. The guidelines and requirements described in this policy are applicable to all employees participating in the city's Telecommuting Program.

Telecommuting will be offered under the terms of this policy and is a matter of management discretion, not a universal employee benefit. There are many instances in which telecommuting will not be compatible with public service requirements or



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expectations, and some work groups or departments may not be able to participate in the Telecommuting Program.

At any time, the City Manager's Office may evaluate the effectiveness of the Telecommuting Program. Upon assessment, the Telecommuting Program may be discontinued or amended.

BACKGROUND:

In 2018, an employee engagement survey showed that the No. 2 satisfaction driver for employees was work schedule flexibility. Flexible work schedules can enhance employee engagement, increase productivity, advance Climate Action Plan efforts to reduce greenhouse gas emissions and embrace transportation demand management measures. Administrative Order No. 57 explains the implementation of flexible work schedules. In concert with whichever schedule is chosen, telecommuting is an additional option for employees who management determines do not need to be physically present at work to accomplish their jobs.

DEFINITIONS

Telecommuting: When employees perform part of their usual job duties at a location away from their usual city work locations at a telework site, as established in a Telecommuting Program Agreement (Attachment A). Telecommuting can be either regular or occasional.

Regular telecommuting: When an employee has an established telecommuting schedule with designated hours and telecommuting days, the designated telecommuting days may not exceed the equivalent of four days per week. The employee must report to the employee's work location at least one or more days per week, at management's discretion.

Occasional telecommuting: When an employee telecommutes on a preapproved intermittent, temporary or project basis.

Telework site: The regular, primary telework site is an area designated in the employee's home for the purpose of performing city work, to be documented in a Telework Site Safety Checklist and Self-Certification (Attachment B).

Telecommuter: An eligible employee participating in the Telecommuting Program.

Management: All authorized approvers as reflected on the Telecommuting Program Agreement. This also includes the City Manager and/or a designee.

GENERAL TERMS & CONDITIONS

- Except for those obligations and responsibilities specifically addressed in this policy and associated documents, an employee's duties, obligations, responsibilities and conditions of employment with the City of Carlsbad, including compensation, benefits and work status, remain unchanged while telecommuting
- Telecommuters and their supervisors must comply with all city policies and procedures, agreements, organizational rules, and state and federal laws, particularly the federal Fair Labor Standards Act (FLSA)
- The violation of any provision of this policy or the misuse of city time or any city-provided equipment may preclude the employee from telecommuting and/or result in disciplinary action, up to and including termination of employment
- Telecommuters must provide contact information to their supervisors. This contact information will be shared with those managers, co-workers and other business contacts necessary for normal business communications with the telecommuter
- No in-person meetings may be held at the employee's telework site

ELIGIBILITY

All full- and part-time employees who meet the criteria outlined below must:

- Adhere to a consistent schedule that has been approved by management
- Be assigned to a position with responsibilities that management determines can be accomplished offsite, working alone and with equipment that can be used at the alternative work site. (For example, classifications that are the first point of contact at a public counter, or that must supervise the work of others in person, may not be suitable for telecommuting). See the Supervisors' Telecommute Resource (Attachment C) for guidelines to determine positions suitable for telecommuting
- Have demonstrated the ability to work independently, manage work time, organize and prioritize work, exercise good judgment, stay connected, communicate in a thorough and effective manner, code time and use leave appropriately in payroll systems and have a history of reliability and responsibility in completing work assignments

APPROVAL TO TELECOMMUTE

The city reserves the right to approve or deny an employee's request to telecommute

based on operational needs and the eligibility factors and approval criteria outlined in this policy. Both regular and occasional telecommuting require management preapproval. A decision to approve or deny a request to telecommute is final and not subject to the grievance procedure or any other appeal.

Management, at management's sole discretion, may rotate telecommuting assignments or limit the number of telecommuting employees and employees working alternative schedules any one time.

Employees allowed to telecommute in one classification or assignment may not necessarily be allowed to telecommute after a change in classification or assignment.

Approval criteria

Telecommuting arrangements must satisfy all of the following criteria:

- Not impact the employee's ability to satisfactorily perform the employee's job responsibilities
- Not unreasonably impact the workload of others
- Not reduce the level of service to the community or internal customers or reduce hours of operation for city facilities
- Not negatively impact coordination of intra- or interdepartmental activities
- Not result in an increase in cost to the city
- Be on any workday(s) approved by management
- Not impact the employee's ability to communicate in a timely and reasonable manner
- Not impact the employee's ability to stay connected with team members
- Other departmental needs as determined by management

Regular telecommuting approval process

Employees interested in participating in the Telecommuting Program must meet with their supervisors to discuss their request. In this discussion, employees will propose a telecommuting schedule and describe how they will accomplish their job duties while telecommuting. Supervisors will communicate expectations and objectives for the completion of assignments and the coordination of work while employees are telecommuting.

Employees will complete a Telecommuting Program Agreement (Attachment A) that:

- Specifies the proposed schedule
- Identifies the telework site and certifies that they will maintain this location in a condition that is free of safety hazards in accordance with

the provisions of this policy

- Provides contact information
- Identifies equipment to be used while performing job duties, i.e., specialized equipment such as laminating machine, label maker
- Certifies that they will employ appropriate security measures in the same manner as when in city facilities
- Document any other conditions agreed upon between employees and their supervisors

As described in the work environment and safety section below, employees must also complete a Telework Site Safety Checklist and Self-Certification (Attachment B).

Telecommuting Program Agreements will be routed for approval.

Telecommuting Program Agreements may initially be granted conditional approval for a period of three to six months and then extended upon successful review.

Telecommuting Program Agreements are subject to earlier termination at any time.

Management will assess the impact of all telecommuting arrangements within the department to determine whether organizational needs are being satisfied, city service levels are being maintained and employee performance is consistently meeting or exceeding expectations.

Occasional telecommuting approval process

Employees may be allowed to telecommute periodically, subject to the eligibility and approval criteria above, approval of a Telecommuting Program Agreement, and completion of a Telework Site Safety Checklist and Self-Certification. The following are examples of situations that may be appropriate for occasional telecommuting:

- To complete special project work that requires a period of uninterrupted work time
- During recovery from injury or illness, as appropriate with written approval of a medical provider
- To provide convenience and maximize work time on days in which offsite meetings or appointments make travel to the regular city worksite impractical
- While all reasonable commute routes are blocked
- While the primary worksite is inaccessible

WORK HOURS

Telecommuting is not a substitute for paid time off, that is, general leave, management leave, or compensatory time. If ill, telecommuters are expected to call in, report their illness to their supervisor or manager and use their sick leave. Telecommuting is also not a substitute for dependent care. Telecommuters must make regular dependent care arrangements.

If the telecommuter becomes sick or must take time away from telecommuting to assist with a family member's illness or injury, the telecommuter must report to the supervisor the need to use the appropriate bank of hours (e.g., sick leave), state the hours of the telecommuting engagement the telecommuter will be unable to work and complete the timecard in accordance with the changes.

The following provisions regarding work hours shall be followed:

- Telecommuters are expected to work at their usual city worksite at least one work day per week
- Telecommuters are expected to work their regular work schedule and be available during that time. Unless changes are otherwise approved in writing, telecommuters are expected to maintain their existing lunch and break schedule
- Telecommuters must report all hours worked each week on their timecard
- Telecommuters entitled to overtime pay are required to obtain prior approval from their supervisor to work beyond their regular work schedule
- Any changes to the agreed upon regular telecommuting schedule must be approved by management, and written approval submitted to Human Resources
- Telecommuters must forego telecommuting when management determines they are needed in the office on a scheduled telecommuting day to meet operational needs. The supervisor will attempt to provide at least 24-hours advance notice but may give less than 24-hours advance notice should an immediate need arise

PERFORMANCE EXPECTATIONS

The following provisions regarding performance expectations shall be followed:

- In addition to usual daily duties, specific objectives and/or assignments

for each telecommuter may be established by the employee and supervisor and will be approved by management. The duties, objectives, and assignments will be documented in the telecommuter's Telecommuting Program Agreement and monitored by the telecommuter's supervisor

- Telecommuters are required to comply with the terms of their Telecommuting Program Agreement
- Telecommuters must be accessible with all forms of communication, such as via telephone, MS Teams or email, just as they are when working at the main worksite. Telecommuters are required to be intentional about staying connected with co-workers and supervisors. This includes using the message notification to the telecommuters' city-issued mobile phones. In addition, telecommuters must follow the communications protocol specified by management (Attachment D)
- Telecommuters must maintain performance at a level that meets or exceeds expectations and continue to satisfy the eligibility and approval criteria established in this policy.
- All computer use is logged, monitored, and may be reported to or requested at the discretion of the employee's department director
- All internet use is captured and can be requested by a telecommuter's department director

PROFESSIONAL APPEARANCE

Telecommuters must ensure that work-appropriate clothing is worn during work hours in the workplace and on video calls. Appearance must convey a sense of professionalism. Telecommuters are encouraged to turn on their camera during video calls.

TERMINATION OF PARTICIPATION

Management may terminate an individual employee's participation in the Telecommuting Program, with or without cause, at any time.

WORK ENVIRONMENT AND SAFETY

When an employee is telecommuting, the employee's telework site is considered an extension of the city's work premises, and certain Cal/OSHA requirements are applicable. After an employee's Telecommuting Program Agreement has been approved and before telecommuting begins, the telecommuter must complete all of the following items:

- Designate a workspace as a telework site and commit to properly maintain

the telework site when telecommuting

- The telework site must remain free of obstructions, hazards, and other dangers to the telecommuter and any city-provided work equipment
- Complete a Telework Site Safety checklist and Self-Certification

Telecommuters are required to provide updated documentation when there are changes to the location of the telework site.

Telecommuters are covered by Cal/OSHA and the city's workers' compensation insurance program during telecommuting work hours and while conducting city work. In the event of an injury that occurs at the telework site during telecommuting hours and while conducting city business, telecommuters must notify their supervisor as soon as practical.

The supervisor must then notify HR Benefits as soon as practically possible. Additional information can be found on the intranet. The telecommuter and supervisor must follow normal workers' compensation procedures and complete all necessary and/or management-requested documents regarding the injury.

In the event an industrial injury occurs at the telework site, or a request is made for a formal Americans with Disabilities Act accommodation at the telework site, the telework site may be inspected by the city's Risk Management workers' compensation staff, third party administrator and/or their vendors, as well as by Cal/OSHA inspectors without advance notice.

In all other situations, with at least 24-hours advance notice, city management may inspect the telework site at any time to ensure compliance with this policy and safety requirements.

OFFICE EQUIPMENT, EQUIPMENT MAINTENANCE, REPAIR AND REPLACEMENT GUIDELINES

Telecommuters must use only computing equipment that is approved as specified in the IT Department Telecommuting Standards. Other than what is specified in the IT Department Telecommuting Standards, no other city-owned equipment or furniture present from the city work site may be removed for purposes of telecommuting.

In addition, telecommuters may use personally owned office equipment while telecommuting. Personally owned office equipment includes, but is not limited to, internet access, phone services, monitors, webcams, printers, paper shredders, fax machines, scanners, calculators, furniture, ergonomic equipment, ink cartridges, etc.

Telecommuters may consult with the city's Information Technology Department for assistance with their city-assigned laptop and mobile phone. However, the city will not provide technical support for personal office equipment. Telecommuters are also responsible for the maintenance and repair of their own office equipment.

LIABILITY

The city assumes no liability for:

- Loss or destruction to the telecommuter's home or personal property
- Injury to the telecommuter that occurs outside of telecommuting hours or while not conducting city work
- Injury to the telecommuter's family members, visitors or invitees within or around the telecommuter's home

INFORMATION SECURITY

It is imperative that confidential information be securely maintained. Telecommuters, like all city employees, are expected to protect confidential, proprietary, and business information from unauthorized or accidental access, destruction or disclosure.

The following information security guidelines apply to telecommuters:

- Comply with Administrative Order 88 – Information System Usage Policy
- Provide a secure workspace for protection of city equipment, city data, and city systems, particularly confidential data
- Follow all security policies and best practices required at the physical work site and as instructed in the city's ongoing IT Security Awareness program. This includes notifying the city of any security incidents
- Return materials (paper documents, computer discs, etc.) containing confidential information to the city for proper storage, shredding or disposal. Do not discard such material in a household receptacle

EXPENSES

Telecommuting is a voluntary program. The city is not obligated to pay for the cost to telecommute. However, any costs related to telecommuting will be allocated as follows:

Responsibility of the city

- Basic office supplies that normally are available at the city work site for the employee's use (e.g., pens, binders, notepads, post-its, etc., **but not including printer ink or toner cartridges**). Just as at the city work site, telecommuters will not be reimbursed for additional office supplies unless approval to

purchase the supplies is given in advance. City-issued supplies will be used for city work purposes only

- Any other costs require the prior written approval by the department director

Responsibility of the employee

- Work-related telephone costs that do not meet department reimbursement requirements or the city's cell phone policy (i.e., employee does not provide itemized statement with work related call charges that are clearly identified)
- Internet network access set-up and continuing charges
- Home workspace furniture, ergonomic equipment and related modifications
- Purchase, repair or replacement of telecommuter's personal office equipment
- Homeowners' and renters' insurance, including any changes in rates or coverage required for telecommuting and maintaining a home office. Telecommuters are encouraged to obtain coverage for business property through the telecommuter's personally purchased policies
- Any cost to relocate personal or city-issued equipment and/or to re-install equipment if the telecommuter moves to a new telework site either at a new residence or a different area in the existing telework site
- Cost of utilities, such as gas and electricity, including maintenance costs incurred while telecommuting
- Cost of traveling to work on the telecommuter's regular telecommuting day or to attend meetings or other required work events
- Cost of repairs or adjustments to the home as required by the telecommuter's initial assessment of the telework site and completion of the Telework Site Safety Checklist and Self-Certification (for example, installation of smoke or carbon monoxide detectors, fire extinguishers, etc.)
- Income taxes
- Employees are encouraged to consult with a qualified tax professional at their own expense to discuss income tax implications related to maintaining a home work space. The city will not provide tax guidance, nor will the city assume any tax liabilities related to this policy

PROCEDURE FOR TELECOMMUTING

Employee

- Meet with supervisor to discuss request and complete the telecommuting

program agreement. If approved, establish designated telework site and complete the Telework Site Safety Checklist and Self-Certification and online ergonomic educational program

- Coordinate remote access with IT Department as specified in the IT Telecommuting Standards
- Maintain telework site in condition free of safety hazards
- Comply with terms of Telecommuting Program Agreement and this policy
- Maintain performance that meets or exceeds expectations
- Notify supervisor of any change in the location of the teleworksite

Supervisor or manager

- Meet with employee to discuss request, establish objectives and assignments, review Telecommuting Program Agreement and recommend approval or denial based on the eligibility factors established in this policy, including an assessment of operational needs
- Forward request to management
- On an ongoing basis, monitor effectiveness of the telecommuting arrangement and compliance with the Telecommuting Program Agreement and modify conditions of the Telecommuting Program Agreement as necessary. At the conclusion of the initial approval period, assess the effectiveness of the telecommuting arrangement and compliance with the Telecommuting Program Agreement to recommend whether or not to extend or renew the term of the Telecommuting Program Agreement

Department director

- Review Telecommuting Program Agreement and any subsequent renewal requests and recommend approval or denial based on the eligibility factors established in this policy, including operational needs
- With assistance from Human Resources staff, the department director will ensure adherence to any meet and confer obligations before approval of the request
- Forward the request to the appropriate deputy citymanager for final determination
- Assess the impact of all telecommuting arrangements within the department to determine whether organizational needs are being satisfied, city service levels are being maintained and employee performance is consistently meeting or exceeding expectations

- Modify or terminate telecommuting arrangements as appropriate
- Establish departmental protocol for regular communications between managers, supervisors and team members (see Attachment D for sample protocol)

Deputy city manager

- Review Telecommuting Program Agreement, deny or approve request and forward to Human Resources

Human Resources

- Advise department director of any meet and confer obligations to ensure adherence
- Communicate approval or denial of Telecommuting Program Agreement to the employee and supervisor
- Communicate the names and telework site addresses of approved telecommuters to Risk Management, as needed

Information Technology

- Maintain Remote Work Guide and IT Telecommuting Standards to guide and assist employees in telecommuting technology procedures and usage
- Implement and maintain technology platforms that support and enable telecommuting

Benefits and Risk Management

- For each approved Telecommuting Program Agreement, identify an appropriate medical services provider for the purposes of workers' compensation near the telework site and notify the teleworker
- Arrange for inspection of the telework site as appropriate in the event an industrial injury occurs at the telework site, or a request is made for a formal Americans with Disabilities Act accommodation at the telework site, in coordination with the workers' compensation third party administrator and its vendors, as well as by Cal/OSHA inspectors
- Provide and administer ergonomic training resources

This policy will be reviewed annually every July.

Attachments:

- A. Telecommuting Program Agreement
- B. Telework Site Safety Checklist and Self-Certification
- C. Supervisors' Telecommute Resource
- D. Department Communication Protocol

ACTION:

This Administrative Order is effective immediately.

DATE: 2/6/2021



SCOTT CHADWICK
City Manager

Attachment A
CITY OF CARLSBAD
TELECOMMUTING PROGRAM AGREEMENT

Date: _____

CONTACT INFORMATION

Employee Name	Department
Title	Division
Telework Site Address	Supervisor Name
Telework Site Phone Number	Department Director Name

TELECOMMUTING SCHEDULE

As defined in the city Telecommuting Program policy, telecommuting can be either regular, with an established schedule, or occasional. The employee must work at a city worksite at least one or more days a week.

Which type of telecommuting are you requesting?

- Occasional
- Regular (please fill out the schedule below)

Day(s) of the week (circle)	Monday Saturday	Tuesday Sunday	Wednesday	Thursday	Friday
Every work week?	Yes	No	If no, please explain:		
Telecommuting work hours	From: _____ To: _____				

TELECOMMUTING AGREEMENT EFFECTIVE DATES

The agreement is conditional, starting with an initial 3 to 6-month term (at the discretion of management) with the possibility of extension. The agreement may be terminated by management at any time, with or without cause. The Telecommuting Program may be terminated by the city at any time, with or without cause.

	Start date	End date
Conditional agreement initial term (3 - 6 months)		
Conditional agreement extension (if approved)		
Annual renewal (if approved)		

WORK DUTIES AND OBJECTIVES

The employee and supervisor have met to review the city Telecommuting Program policy, including the definition of telecommuting, eligibility criteria general terms and conditions and the process for approval to telecommute. The employee and supervisor have discussed how the employee's job duties can be accomplished while telecommuting resulting in the following expectations.

Duties to be performed/objectives to be accomplished while at the telework site:
How will performance of these duties and progress toward these objectives be monitored and assessed to confirm that the telecommuter is working as expected during telecommuting hours and the telework arrangement is effective?
What challenges regarding completion and coordination of work assignments could you anticipate might occur associated with telecommuting? Please be as specific as possible.
What arrangements will the employee make to address these potential impacts in order to ensure staffing coverage, coordination of work, completion of assigned projects, and responsibilities?
Additional terms or expectations agreed upon by the telecommuter and supervisor are as follows:

TELEWORK EQUIPMENT

The employee will use the following equipment while telecommuting. City equipment, if any, will be used only by the employee while telecommuting and will be used for city business only. If the employee separates from employment, employee will return city issued equipment.

City-provided:	
Employee-provided:	

INFORMATION SECURITY

Confidential information shall not be taken out of the city worksite to the telework site unless approved in writing in advance by the telecommuter's supervisor. Approval is required for each instance such materials are required for use at the telework site. Department head approval is required if authorization is needed for the duration of the Telecommuting Program Agreement.

Is offsite use of confidential information anticipated?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes:		
What confidential information will be used at the telework site?		
Will use be authorized for the duration of the telecommuting program agreement?	<input type="checkbox"/> Yes <input type="checkbox"/> DH approval	<input type="checkbox"/> No

EMPLOYEE ACKNOWLEDGMENTS

The employee must read and agree to the following:

- I have read and understand the city's Telecommuting Program policy and will comply with all conditions, policies, responsibilities, and procedures set forth in this policy.
- I understand and will comply with the terms and conditions established in this *Telecommuting Program Agreement*.
- I agree to adhere to all city policies and procedures while telecommuting, including FLSA requirements.
- I understand that the city reserves the right to approve or deny an employee's request to telecommute based on the department's operational needs, eligibility factors, and approval criteria outlined in this policy.
- I understand that telecommuting is voluntary, and I may discontinue telecommuting at

any time. I understand that the city may, at any time, change any or all of the conditions under which I am permitted to telecommute or withdraw permission to telecommute.

- I agree to be available to work with colleagues via email, phone or any other pre-identified technology platforms (e.g. MS Teams) during my established telecommuting hours.
- I agree to check voicemail, email or any other pre-identified communication media and respond to these promptly, upholding the same standards and expectations for responsiveness as when working at my city worksite.
- I agree to participate in scheduled meetings via audio or video conference call or some other means.
- I acknowledge that management retains the right to modify my telecommuting schedule to ensure my attendance at meetings or trainings in person or to accommodate other business needs.
- I agree to work productively without onsite supervision.
- I agree to ensure that a full work day is completed and to obtain prior approval by my supervisor to adjust my work hours or take leave to compensate for non-productive time which occurs due to dependent care needs, personal appointments or other non-city business matters in the normal work period.
- I agree to take my normal lunch break and other breaks as applicable.
- I agree not to work overtime while telecommuting unless prior approval is received from my supervisor, manager, or department head.
- I understand that it is my responsibility to provide and pay for sufficient power and suitable internet connectivity at my telework site to allow successful telecommuting. At no time will the city be responsible for providing internet connectivity and power at the telework site.
Should the equipment or access required to perform my work (e.g., computer, internet connection, phone service, etc.) become unavailable during my telecommuting hours, I agree to come to my city worksite or take those hours as time off, if appropriate.
- I understand that the city owns any work product or data created as a result of my work while telecommuting.
- I agree to keep my username and password confidential to maintain network security, to provide a secure location for any city-owned equipment and materials, and not to use, or allow others to use, such equipment and materials for purposes other than city business.
- I agree that restricted-access materials, such as payroll records, personnel files or other confidential documents will not be taken to my telework site without the consent of my supervisor, with approval on a case-by-case basis, or without the consent of my department head if such restricted-access materials are to be approved for use at my telework site for the duration of the Telecommuting Program Agreement.
- I agree to establish and maintain a telework site in a condition that is free of health and safety hazards in accordance with the Telework Site Safety Checklist and Self-Certification document.
- I agree to allow inspection of my telework site by the city's Risk Management staff, workers' compensation third party administrator and/or its vendors, or Cal/OSHA as necessary in the event of an industrial injury at my telework site or upon request for

ADA accommodation(s) at my telework site.

- I agree to comply with tax laws, and I understand that the city is not responsible for substantiating any claim of tax deductions for operating an office in my home.
- I understand that the city assumes no liability for injuries that occur outside my scheduled telecommuting hours, or while I am not engaged in city business, and that the city assumes no liability for injuries to any third parties and/or my family members associated with my telework site.

EMPLOYEE AGREEMENT

I have read and understand the city's Telecommuting Program policy, a copy of which is attached, and will adhere to its terms and conditions. I agree to all employee acknowledgments above and will adhere to the terms and conditions set forth in this Telecommuting Program Agreement.

I understand that my work performance and compliance with this Telecommuting Program Agreement will be evaluated upon completion of the initial telecommuting timeframe.

I agree that I am responsible for abiding by the established telecommuting work hours, furnishing and maintaining my remote workspace in a safe manner, employing appropriate telecommuting security measures, and protecting city assets, information, and systems. I understand that telecommuting is voluntary and can be suspended or terminated at any time by me or by the city.

Employee name	Employee signature	Date
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SUPERVISOR ACKNOWLEDGMENTS

The supervisor must read and initial the following:

- I have read and understand the city's Telecommuting Program policy.
- I have read and understand the conditions listed in this Telecommuting Program Agreement.
- I agree to monitor the performance of the telecommuter to assess the effectiveness of the telecommuting arrangement and compliance with this Telecommuting Program Agreement.

APPROVAL OF INITIAL TELECOMMUTING PROGRAM REQUEST

Supervisor signature

Date

Department Director signature

Date

Deputy City Manager signature

Date

Attachment B
CITY OF CARLSBAD

Telework Site Safety Checklist and Self-Certification

Name: _____ Employee ID _____

Department/Division: _____

Telework Site Address: _____

As a City of Carlsbad employee, you are responsible for adhering to safe work practices in all locations in which work is performed. Please ensure your telework site meets the following requirements:

Work Environment and Practices

- Height of chair and desk, along with spacing of computer, keyboard, and other tools are positioned correctly in accordance with ergonomic best practices communicated in handouts and/or online ergonomic training provided by the city.
- Telework site has adequate lighting and computer is free of glare.
- Telework site is arranged to minimize excessive twisting, bending, reaching and pulling.
- Floors and walking surfaces are kept uncluttered and free of slip and fall hazards.
- Proper bending techniques are used when picking up heavy items.
- Ladders or step stools are used when reaching for or storing items in higher places.
- Reasonable workspace temperature can be maintained.

Electrical Equipment

- Any lamps, fans, heaters, and other electrical equipment or appliances are adequately maintained and plugged in properly and warnings are abided by.
- Adequate electrical outlets exist in telework site to avoid overloading any circuits.
- Extension cords are in good condition without any splices, deterioration, taping or other damage.
- Electrical outlets and extension cords are grounded (for example, three-plug electrical equipment OR appliances are not plugged into two-plug outlets or extension cords).
- Extension cords are protected by cord guards if routed across an aisle or other passageway.
- Multiple outlet strips have circuit breakers and are tested periodically.
- Electrical cover plates are in place over electrical switches and outlets.
- Space heaters have working tip-over switches and are plugged directly into the wall.
- Combustibles are not kept within two feet of the sides and tops of heaters.

Emergency Preparedness

- First aid supplies are available.
- Exit doors, hallways, and corridors are free of obstacles and combustible storage.
- Smoke detector(s) and carbon monoxide detector(s) are installed and maintained in accordance with applicable code regulations in the city of the telework site.
- A fire extinguisher (at a minimum, model #2A10BC) is fully charged and easily accessible

to the telework site.

- There is an evacuation plan, including access to more than one way out of the work area.
- You have immediate access to dial 911.

SAFETY SELF-CERTIFICATION AND AGREEMENT

1. I acknowledge and fully agree to adhere to safe work practices when performing tasks on behalf of the City of Carlsbad when telecommuting.
2. I certify that my workstation meets the requirements listed above.
3. I will notify my supervisor should there be a change in the location of my telework site or its adherence to the requirements in this checklist.
4. I will immediately report any on-the-job injuries to my supervisor and the risk manager.

Employee signature

Date

Employee name

APPROVED:

Supervisor signature

Date

Supervisor name

Department Director signature

Date

Department Director name

cc: Human Resources

Attachment C

City of Carlsbad

Supervisor Telecommute Resource

INTRODUCTION AND PURPOSE

The City of Carlsbad is dedicated to creating a work environment that promotes employee engagement, wellness, and high levels of performance. In support of these goals as well as in support of the Climate Action Plan, the city is introducing a Telecommuting Program that may allow eligible employees to telecommute, completing their work from a home telework site.

This resource is for City of Carlsbad supervisors, managers, and department directors to help evaluate employee telecommuting requests, determine if the employee's job functions are appropriate for telecommuting, review operational needs, and support effective telecommuting arrangements through clear expectations and ongoing monitoring, feedback and dialogue.

For more information on the City of Carlsbad's Telecommuting Program policy, including relevant definitions, conditions and approval procedures, please refer to the full policy document, Administrative Order No. 86, or contact Human Resources with any questions at hrmailbox@carlsbadca.gov.

WHY TELECOMMUTING?

Telecommuting is a tool for improving the employee experience and increasing productivity. In addition, telecommuting may be used as a strategy to reduce traffic congestion, commute costs for employees, and carbon emissions from driving in support of the city's Climate Action Plan.

EMPLOYEE ELIGIBILITY

The Telecommuting Program policy specifies that to be eligible to telecommute, employees must meet the following requirements:

- Be assigned to a position with responsibilities that can be successfully performed away from the regular city worksite.
- Have demonstrated the ability to work independently, manage time, organize and prioritize work, exercise good judgment, code time and use leave appropriately, and have a history of reliability and responsibility in completing work assignments.
- Employees who are on a Performance Improvement Plan or have received any form of discipline in the last year may not be eligible. The department should consult with HR in making their determination.

Due to the nature of many of the services offered by the city, there may be limits that affect

whether telecommuting is possible. As a supervisor, you are most informed about the employee's responsibilities, ability to successfully telecommute, and the potential for telecommuting to be an effective motivator for employees who consistently perform at a high level.

Employee eligibility considerations

Does the nature of the work lend itself to telecommuting?

- The employee performs tasks or projects independently.
- The job entails periods of working without equipment or with equipment that can be used at the telework site.
- The job entails clearly defined tasks, objectives, priorities, and measurable work activities.
- The job entails periods of time that do not require face-to-face communication or a physical presence and where communicating and coordinating with coworkers, direct reports, internal customers, or community members is appropriate via email or phone.
- The employee's job responsibilities are the same on a regular workday as the telecommuting day.

Does the employee meet the expectations required for telecommuting?

- Has a history of reliability and responsibility in completing work assignments
- Able to establish priorities and effectively manage his or her time
- Able to establish and follow clear objectives
- Able to work independently and to meet deadlines
- Flexible
- Responds to verbal and written communication in a timely manner
- Able to determine the most effective methods for communicating effectively with supervisors, co-workers, and other team members
- Communicates frequently about the status of work assignments

OPERATIONAL NEEDS

Operational needs of city departments and divisions vary significantly, and it is important for supervisors and managers to consider their own context when considering a telecommute request. Telecommuting arrangements must not:

- Impact the employee's ability to satisfactorily perform their job responsibilities
- Reduce the level of service to the community or internal customers or reduce hours of operation for city facilities
- Unreasonably impact the workload of others, or the coordination of intra- or interdepartmental activities. This may require that the employee's regular telecommuting day not occur during core days, if any, that have been identified by management
- Result in an increase in cost to the city

STRATEGIES FOR SUPERVISING AND MANAGING TELECOMMUTING EMPLOYEES

Telecommuting programs have many potential benefits to the city, employees and supervisors. The Telecommuting Program Agreement is the first step for both the employee and supervisor to clearly communicate expectations for performance while working remotely. Often, telecommuting programs are successful due to forward thinking principles and a results-oriented approach between the supervisor and employee.

The following are items to consider adding when you are drafting and discussing the Telecommuting Program Agreement with the employee:

- Short-term and long-term goals and objectives the employee must effectively accomplish
- Projects or assignments the employee can accomplish effectively due to the reduction in day-to-day interruptions in the office
- Methods that will be used to keep in close and regular communication with telecommuting employees to foster a sense of inclusion and instill the importance of productivity, even when working remotely
- Clear expectations regarding accessibility, responsiveness, and timelines for the telecommuter's completion of assignments
- Periodic check-in with questions or requests for status reports
- Clear expectations of how and when a telecommuting employee should be reachable via telephone or email, during agreed upon work hours
- Clear performance standards to gauge how the telecommuting arrangement will lead to continued high overall productivity
- Ongoing monitoring of performance and timely feedback, based on work outputs and behaviors, possibly including:
 - Documents and reports
 - Internal and external email communication
 - Timely responsiveness to phone calls and emails
 - Contributions on conference calls and video conferencing
 - Completion of weekly assignments, meeting project schedules
 - Satisfaction of other departments on interdepartmental support
- Communication of required in-person meetings that need to be considered before scheduling a telecommuting day.

Additional strategies for supporting an effective telecommuting arrangement include:

- List the Telecommuting Program Agreement on the agenda for one-on-one meetings with your employee. During this time, share your own thoughts about the employee's productivity during the employee's telecommuting days, and seek the employee's perspective on how the arrangement is working for the employee.
- Follow the timelines set forth in the policy for monitoring the effectiveness of the telecommuting arrangement and modify the Telecommuting Program Agreement as necessary.

Attachment D

CITY OF CARLSBAD

Communication Protocol for Remote Work

Purpose

Good communication is always hard and requires intention. However, when teams do not have the convenience of physically working in the same space it can be a greater challenge especially if there is not an agreed upon protocol or shared set of expectations. When working in this context, it is important that we communicate in a methodical and consistent manner. Response to all business should be conducted as usual other than what's discussed in this protocol. This includes your typical work tasks such as ServiceNow tickets, project work, system maintenance and administration. If a work activity requires you to visit a worksite, that is allowed so long as social distance is maintained, and other health/safety guidelines are followed. If there is a need to be onsite and you are unable to do so, please contact your supervisor.

Protocol

Guidelines for communication as a team are as follows:

- All requests or incidents from users should be directed through ServiceNow. Any direct contacts should be routed to ServiceNow so that all notes and interactions can be captured there.
- For questions or discussions that do not fall into the request or incident categories, please batch those items for discussion during daily updates and team meetings.

Any communications that fall outside of ServiceNow should take place in the Microsoft Teams application

Communication tools used while working remotely will be used as follows:

Microsoft Teams

- We will use MS Teams to replace in-person interaction.
- Since MS Teams will be our go-to communication vehicle, we commit to being responsive to one another. Whether you are a staff member working on or offsite, think of it as being at your desk and communicating with your co-workers.
- Complex discussions should take place via MS Teams audio and video. To ensure we maximize this vehicle, we have established the following guidelines for video conferencing:
 - Limit background noise to the best of your ability.
 - Manage use of the mute button. It's best to be muted unless you need to speak but remember to unmute yourself before you need to speak.
 - Use video whenever possible to improve interaction in large meetings. People will be able to see you gesture if you need to speak and will be aware if you're speaking while on mute.

- Be mentally present. Since our communication will be less frequent, we need to make the most of it; do not multitask.
- **Email**
 - Expectations for email communication are business as usual. Use this tool as you always do.
 - Please check and respond to your email throughout the workday.
- **Phones**
 - Have your cell phone with you during your work hours and be available to answer immediately.
- **Meetings**
 - All staff members are expected to check in each morning to signify they are available and on shift. Please do this via text or MS Teams chat.
 - All managers will schedule an end of day video meeting with their teams. Topics discussed will be:
 - Re-cap of the day
 - Look ahead
 - Major issues
 - Situational awareness (updates regarding the present situation)
 - Other meetings will be held and conducted as discussed with your groups.
 - If you are scheduled to meet with staff outside of IT, please let them know when you will be attending remotely.

Please check with your manager for clarification on any of these items.