

**Set of Checklists for Phased Introduction of Telework.
(To be used in conjunction with Handbook Section 4.3)**

Checklist 1 : For Future Teleworkers (for use in phase 2: feasibility study)

Checklist 2: Questionnaire for Future Teleworkers (for use in phase 2: feasibility study)

Checklist 3: ICT Requirements Analysis Checklist (for use in phase 3: concept)

Checklist 4: Checklist for the Introduction of Telework in SMEs (for use in phase 3:concept)

Checklist 1 : for Future Teleworkers (for use in phase 2: feasibility study)

Set-up of the domestic workplace				
1	Is a separate workroom suitable for telework available?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ check whether another room with sufficient space and not frequented by fellow residents during working hours is available. ⇒ consider refraining from telework	<input type="checkbox"/> not known ⇒ minimum criteria (check legal requirements, recommendations) ⇒ carry out trial sessions
2	Is there a suitable fixed electricity supply in the workroom?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ install (consider consulting a competent person)	<input type="checkbox"/> not known ⇒ check (consider consulting a competent person)
3	Is a telephone point or an ISDN connection available in the workroom?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ apply for an ISDN-connection ⇒ install a NTBA in the workroom (by competent person) ⇒ notify landlord if the building structure is affected	<input type="checkbox"/> not known ⇒ check
4	Is suitable office furniture available (chair, desk, shelving, cabinet) that complies with the legal requirements (Health & Safety law)?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ arrange provision	<input type="checkbox"/> not known ⇒ check legal requirements ⇒ if available contact ergonomics advisor ⇒ obtain information (eg of employers' associations) ⇒ carry out a workplace analysis
5	Is the workplace set out ergonomically (seating position, desk height, monitor position, monitor quality, sufficient lighting, shades to avoid direct sunlight)?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ use other workstation equipment ⇒ consider a different room layout	<input type="checkbox"/> not known ⇒ obtain information (eg of employers' associations)
6	Is lockable filing storage available (drawers, cabinets)?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ obtain office furniture from employer or self	<input type="checkbox"/> not known ⇒ check

7	Is the workstation equipment (furniture, PC, monitor) suited to the size of the workroom?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ consider changing equipment (eg flat screen monitor instead of CRT monitor)	<input type="checkbox"/> not known ⇒ prepare a room plan ⇒ determine space requirements of the workstation equipment
8	Is the equipment technology at the teleworkplace compatible with that at the central workplace?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ use compatible equipment components and software as far as possible	<input type="checkbox"/> not known ⇒ carry out an assessment of technology requirements
9	Can equipment that is generally shared in the office (fax, printer, copier, shredder) be done without?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ arrange provision ⇒ check alternative solutions (eg printing output at head office on instruction sent from teleworkplace PC)	<input type="checkbox"/> not known ⇒ carry out an assessment of technology requirements
10	Is all necessary equipment (incl office supplies) available at the teleworkplace?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ prepare a list ⇒ arrange provision	<input type="checkbox"/> not known ⇒ carry out a workplace assessment
11	Is there a reception area for official visitors?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ consider designating a room (living room or dining room) ⇒ receive official visitors in the main office, adapt telework model accordingly	<input type="checkbox"/> not known ⇒ check ⇒ ask supervisor what the requirements are
12	Is the teleworkplace sufficiently protected against unauthorised access?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ install measures to prevent unauthorised access ⇒ install burglar alarm ⇒ inform members of the household	<input type="checkbox"/> not known ⇒ obtain information from the employer ⇒ obtain information from insurance companies
13	Do members of the household agree in principle to allow representatives of the employer and of state supervisory authorities access to the residence?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ refrain from telework	<input type="checkbox"/> not known ⇒ discuss topic (Note: retraction of right of access is possible at any time)
Mobile Workplace				
14	Is the mobile equipment (in particular a notebook) suitable for the task?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ check equipment components and consider revising	<input type="checkbox"/> not known ⇒ carry out a technology assessment
15	Is mobile equipment (notebook, mobile phone) available for use at any time?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ in the case of pooled equipment, determine responsibility for care of equipment early on	<input type="checkbox"/> not known ⇒ check

16	Is the mobile phone network accessible at the usual workplaces?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ when selecting the mobile phone network consider geographical coverage ⇒ test frequent workplaces for transmission dead spots? ⇒ test availability on frequently used railway lines	
17	Can work continue even during loss of online access?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ plan offline-work, particularly when travelling by train ⇒ make important applications also available on hard disk	<input type="checkbox"/> not known ⇒ carry out a technology assessment ⇒ base selection of equipment on the results
18	Can work continue in the event of equipment battery failure?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ always take replacement batteries when travelling ⇒ prior to embarking on a train journey reserve a seat near an electrical socket	<input type="checkbox"/> not known ⇒ check whether replacement batteries are available
19	Is contactability during journeys at individual discretion?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ method of contact ⇒ ensure E-mail access ⇒ set up communication filters (eg activate mailbox function)) ⇒ consider handing out mobile phone number only selectively	<input type="checkbox"/> not known ⇒ work through scenarios: when am I accessible, where and for whom?
Time management and self organisation				
20	Will working time be free from distraction?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ Arrange the workplace and environment in such a way that the working atmosphere is distraction-free.	<input type="checkbox"/> not known ⇒ carry out trial sessions ⇒ work through scenarios (What would the effect on my work be if ...?)
21	Does a “working atmosphere” also exist at the teleworkplace?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ consider also wearing office clothes at home as it gives a stronger feeling of working	
22	Are the most productive times of the day used for professional activities?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ find the optimal working hours subject to own creativity phases, private interests and family framework ⇒ note work related ideas even outside working hours	<input type="checkbox"/> not known ⇒ try out various working hours

23	Do you succeed in starting work early in the morning without any problems?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ keep to regular working hours ⇒ consider also wearing office clothing at home ⇒ get training in time management, communication or personal development	<input type="checkbox"/> not known ⇒ build up experience over several weeks ⇒ react early to signs that discipline is decreasing
24	Do you finish work and “switch off” in the evenings without any problems?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ keep to regular working hours ⇒ establish regular times when no work is done ⇒ set up a daily work plan and adhere to it	<input type="checkbox"/> not known ⇒ build up experience over several weeks ⇒ react early to signs that discipline is decreasing
25	Is sufficient time available for longer stretches of undisturbed work?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ make telephone calls together to allow time for undisturbed work in one stretch	<input type="checkbox"/> not known ⇒ build up experience over several weeks
26	Does the work on the computer alternate sufficiently often with other activities involving moving about the room?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ allow for regular and sufficient breaks in particular when working on the computer	<input type="checkbox"/> not known ⇒ on selected days note all activities with timings (work diary) ⇒ analyse the results with respect to duration of work phases
27	Do you succeed in organising the working day and in distributing working hours between the individual tasks without any problems?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ each day prepare a "to do"-list ⇒ consider use of organiser-software (e.g. MS Outlook) ⇒ carefully note down times needed for the various tasks	<input type="checkbox"/> not known ⇒ on selected days note all activities with timings (work diary) ⇒ analyse the result with respect to opportunities for optimisation
Dealing with changing workplaces				
28	Were personal tasks assessed with regard to which activities were best suited to being carried out at the teleworkplace?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ plan the working week in such a way that activities are allocated to the various workplaces.	<input type="checkbox"/> not known ⇒ carry out a workplace needs analysis
29	Has consideration been given to those activities staff need management to be present (e.g. lack of signatory authority)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ consider and agree with employees	

30	Are there sufficient opportunities for team discussion?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ bundle face to face discussions and meetings on office days ⇒ wherever possible replace ad-hoc meetings with planned or arranged meetings	<input type="checkbox"/> not known ⇒ work through scenarios before commencing telework (what meetings would I have missed last week had I been teleworking already?)
31	Is it known which activities are carried out at home and which in the office?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ prepare a to-do list for teleworkplace and office workplace	
32	Were the times of the day that contact could be made over the phone agreed with the team?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ determine contact times in general or short-term, in order to avoid obstacles to communication ⇒ agree conditions where contact is desirable even outside normal working hours	
33	Are all documents needed for work available at the respective workplace at all times?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ consider ahead which documents, lists, handbooks etc are needed at which workplace ⇒ obtain duplicates or second copies of frequently needed documents	<input type="checkbox"/> not known ⇒ carry out a workplace analysis
34	Have arrangements been made for transferring documents (records) between the teleworkplace and the main office?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ arrange document transfer system (own transport, postal service, courier)	<input type="checkbox"/> not known ⇒ carry out a workplace analysis
35	Can all working documents get to where they are needed even in exceptional circumstances (eg own illness)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ make provisions (e.g. for a return transport of documents in case of illness)	<input type="checkbox"/> not known ⇒ carry out a workplace analysis
36	Are mechanisms for recording working hours at the teleworkplace agreed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ make arrangements for non-management employees ⇒ self-recording or automatic crediting of contractually agreed working hours is recommended	
37	Has it been agreed with the team how results of meetings which cannot be attended must be passed on?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ make arrangements ⇒ determine responsibility	

38	Can work continue even when telecommunication links to the main office are lost??	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ identify activities which can be carried out at the teleworkplace when the connection is lost ⇒ ensure that, if necessary, spontaneous return to the office workplace is possible	<input type="checkbox"/> not known ⇒ work through scenarios
39	Has a course of action been agreed in the case of illness on a teleworking day?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ make arrangements (e.g. sickness notification procedures, return of working documents)	
Evaluation of efficiency, lobbying and further education				
40	Is there contact with other teleworkers in the organisation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ initiate exchange of experiences with other teleworkers ⇒ organise meetings ⇒ formulate common interests and pass them on to project leaders as requirements	
41	Is it certain that telework will not impair career opportunities?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ open discussion with supervisors ⇒ consider refraining temporarily or permanently from telework ⇒ communicate actively, show willingness to take on work ⇒ emphasise own achievements in the team to overcome “invisibility” of professional achievement	<input type="checkbox"/> not known ⇒ open discussion with supervisors
42	Is the supervisor at any time informed about what work is produced for the organisation at the teleworkplace?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ actively emphasise achievements ⇒ clarify that telework is not (only) chosen for personal reasons but (also) to increase work efficiency	<input type="checkbox"/> not known ⇒ open discussion with supervisors

43	Is it certain that continuing further education is also available at the teleworkplace ?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ ensure access to literature (e.g. circulating magazines) ⇒ make internet access available ⇒ check novel training and further education offers (telelearning, CD-ROM) ⇒ consider adapting telework model (more frequent office working days)	<input type="checkbox"/> not known ⇒ check information sources
44	Are contact persons available who can assist with well-founded knowledge in case of application problems (eg operation of software)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ designate staff to function as contact persons for the basic applications	
Domestic environment				
45	Has the future work situation been discussed with the family/household members?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ work towards persuading the family in favour of telework ⇒ discuss effects on everyday life	
46	Do all members of the household agree with the installation of the teleworkplace?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ discuss objections ⇒ consider measures to avoid inconveniencing cohabitants	<input type="checkbox"/> not known ⇒ discuss the topic openly with all members of the household
47	Can it be guaranteed that family or household members will not disturb during working hours?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ make arrangements with the family to allow undisturbed working ⇒ establish basic rules regarding the circumstances in which interruptions are allowed	<input type="checkbox"/> not known ⇒ make arrangements with the family to allow undisturbed working
48	Can it be guaranteed that telephone callers will not be distracted by noise disturbance from the domestic environment?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ determine rules for behaviour ⇒ consider improving noise insulation or choose a different room	<input type="checkbox"/> not known ⇒ carry out tests whether household noise can be perceived on the phone
49	Have childcare arrangements been made for the working hours at the teleworkplace?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ consider employing a childminder for the working hours ⇒ also make arrangements for exceptional situations (e.g. school closures, illness)	<input type="checkbox"/> not known ⇒ discuss topic with members of the household ⇒ work through scenarios

50	Are other disturbances during working hours also prevented?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ keep to a tight daily schedule ⇒ reduce disturbances during working hours to a minimum ⇒ accept disturbances that take up little time (eg receiving mail)	<input type="checkbox"/> not known ⇒ work through scenarios
51	Do neighbours and acquaintances understand and accept the new work situation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ inform neighbours and acquaintances about the new work form in order to avoid gossip and misunderstandings (unemployed, absenteeism)	<input type="checkbox"/> not known ⇒ communicate proactively
Work environment				
52	Do you lead staff effectively even without direct contact?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ do not judge the behaviour of staff but the work result	<input type="checkbox"/> not known ⇒ utilise experiences from times while away on business
53	Do staff know which objectives they should achieve, how to achieve them and against what criteria they are being measured?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ agree on objectives together with staff (what, by what time and what quality) and document	<input type="checkbox"/> not known ⇒ find out in individual talks
54	Can mechanisms for staff evaluation also be used for telework?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ consider modification of evaluation mechanisms ⇒ increase use of office working days to communication with staff	<input type="checkbox"/> not known ⇒ gain experiences over several weeks
55	Is the relationship with staff based on trust?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ take team building measures ⇒ seek conversation in an informal setting, also outside working hours	
56	Do you feel that you are still regarded as a full colleague or supervisor and involved in the decision making process accordingly?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ seek constant contact ⇒ communicate actively ⇒ increase use of telephone and E-Mail	
57	Are all working partners reachable via E-mail and do they reply promptly?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ if necessary press staff and colleagues to use the internal mail system more intensively ⇒ consider using other media	<input type="checkbox"/> not known ⇒ carry out test (how long individuals take to react to an E-mail?)

58	Is there sufficient personal communication between staff as well as colleagues and supervisors?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ make more appointments for meetings ⇒ steer informal communication into more formal channels ⇒ seek contact in an informal setting, also outside working hours	<input type="checkbox"/> not known ⇒ carry out an analysis of communication relationships (as part of the workplace analysis)
59	Are meetings target oriented and do they assist the intensive exchange of ideas in the team?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ try to organise meetings more effectively by setting an agenda and (better) preparation ⇒ at the same time create a relaxed setting to also allow informal communication during a planned meeting	<input type="checkbox"/> not known ⇒ self-critical discussion with the team about weaknesses and optimisation potential
60	Are staff and colleagues aware that you can be contacted at home at any time should any questions or problems arise?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ communicate actively, as there are generally great inhibitions toward contacting a supervisor at home ⇒ clarify that telework does not mean you want less contact with staff ⇒ set up a call forwarding connection	<input type="checkbox"/> not known ⇒ discuss with the team
61	Are staff able to work in their area of responsibility without having to contact their supervisor all the time?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ delegate responsibility	<input type="checkbox"/> not known ⇒ discuss with the team ⇒ use experience from own absence (holidays, illness, business travel)
62	Are there unambiguous arrangements for those tasks which cannot be carried out at the teleworkplace (e.g. visitor reception)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ designate individuals and allocate tasks	<input type="checkbox"/> not known ⇒ discuss with the team
63	Have arrangements been made for a designated contact person if particular assistance is required (eg access to only centrally available documents)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ designate individuals and allocate tasks	<input type="checkbox"/> not known ⇒ discuss with the team

64	Can envy and resentment amongst colleagues be avoided?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ encourage more transparency ⇒ discuss problems, annoyances and fears in department-wide meetings and look for possible solutions	<input type="checkbox"/> not known ⇒ discuss with the team
65	Are clients and other work partners comfortable with the knowledge that work is done from home?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ inform clients, suppliers, cooperation partners etc regarding the introduction of telework ⇒ pass on telephone number of the home office or have it printed on business card	<input type="checkbox"/> not known ⇒ gain experience over several weeks
Other (own level of knowledge and other activities)				
66	Are all relevant financial and legal aspects resolved with the employer?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ finalise individual agreements ⇒ consider pressing the workers' council for finalisation of a workforce agreement	<input type="checkbox"/> not known ⇒ consider checking business agreement ⇒ register need for clarification with project leader and personnel department
67	Is it certain that setting up the teleworkplace will not lead to under-insurance of the home contents?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ exclude equipment supplied by the organisation from the private home contents insurance	
68	Can technical support be arranged quickly at the teleworkplace?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ designate one contact person in the data processing department ⇒ determine performance specification for response and fault repair	
69	Are the fiscal effects of telework known and have their consequences been taken into consideration?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ seek advice from tax consultant ⇒ check support for using own house and possibility of tax deduction for the work room ⇒ consider adapting organisation of telework in order to benefit from tax advantages	

**Checklist 2: Questionnaire for Future Teleworkers
(for use in phase 2: feasibility study)**

Name: _____

Business unit: _____

1. ***Domestic situation/workroom***

Do you have a separate workroom available at home?

Yes, size: _____ m²

No, the work area would be set-up in _____

Below, please prepare a plan of your workroom/ work area showing room dimensions as well as position of windows and doors.

Is cabling of the workroom/ work area (ISDN connection) possible?

Yes

No

2. **Other members of the household**

How many people live in your household? _____

How many children do you live with?

No children

One child, age: _____

Two children, ages: _____ and _____

Three and more children, ages: _____

Do people needing care live in your household?

No

Yes, give details:

How would you ensure care for your child/children or other dependant during your home working hours?

3. **Work experience**

Length of experience

in your profession? Since _____

in this organisation? Since _____

in your current department? Since _____

4. **Working hours**

Are you working full time?

Yes

No, working hours per week: _____ hours

If No, would you like to continue with your current working hours for telework?

Yes

No, preferred working hours per week: _____ hours

5. **Organisation of telework**

In principle would you be prepared to give up your allocated desk in the office, ie to share the office workplace with other teleworkers?

Yes

No

6. **Scheduling of telework**

For telework to be successful a suitable distribution of working hours between office and teleworkplace are of great importance.

For full time staff

A number of conceivable distribution models are listed below. Please indicate for each of them whether you would prefer, accept or refuse it. .

	<i>I would ...</i>	<i>prefer</i>	<i>accept</i>	<i>refuse</i>
a) exclusively at home		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) 1 day in the office - 4 days at home		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) 2 Days in the office - 3 Days at home		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) 3 Days in the office - 2 Days at home		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) 4 Days in the office - 1 day at home		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) tandem model: 2 teleworkers share the office workplace, every second day is spent at home		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g) phase model: changing number of working days at home, depending on current business requirement		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

For part time workers

Which distribution model would you prefer? _____

7. **Personal details**

How old are you?

- up to 30 31-35 36-40 41-45 over 45

What is the distance between your home and the office?

in kilometres: _____

travel time: _____

Checklist 3: ICT Requirements Analysis Checklist (for use in phase 3: concept)

Requirements catalogue, basic functions and data communication

PC-Basic components

- storage media (hard disk, disk drive, CD-ROM-drive) sufficient for secure data storage and safe keeping
- storage media for secure data transport and safe keeping (Streamer, CD-burner)
- upgradeable system
 - sufficient number of available free slots (PCI min. 2, ISA min. 4)
 - board designed for higher performance CPUs (processor-change)
 - expandable working memory
- mobile system (desktop vs. notebook with docking station)
- compactness: system adapted to the size of the workroom (particularly the monitor, PC)
- screen size and quality sufficient for desired applications
- hardware-equipment in line with EU-display screen equipment guidelines
- private use possible (without any impact on data security, eg replacement hard disks)
- distance (remote) maintenance possible

Print, Copy, Scan

- print function in line with requirements (pages/ day, format, colour or b/w, quality)
- print output optionally at the teleworkplace or the main site.
- copy function in line with requirements (original format, pages/ day, quality of original, quality of copies)
- scanning function in line with requirements (size of original, pages/ day, colour or b/w, quality)

Fax

- fax receipt with direct hard copy output
- fax transmission of paper-based originals possible and in line with requirements (size of original, average pages/day, colour or b/w)
- PC-based fax receipt and transmission
- multiple page transmission
- contactability by fax at teleworkplace and main office workplace under the same number
- automatic call forwarding of faxes central office teleworkplace
- telephone number storage

- fax distribution (group dial)
- delayed fax transmission (programmable time of transmission)

E-Mail

- transmission and receipt of E-mails
 - internal
 - internal with attachments
 - external
 - external with attachments
- contactability by *internal* E-Mail at teleworkplace and main office workplace under one address
- contactability by *external* E-Mail at teleworkplace and main office workplace under one address
- mail functions
- replying
- forwarding
- re-directing
- carbon copies

Video communication at the (tele-)workplace

- PC-based desktop-video communication
- application sharing:
 - on the basis of decentrally installed applications
 - on the basis of applications on a central server, e.g. host

Software at the teleworkplace (TWP)

- text processing, spreadsheet programmes etc. in line with the standard of the business unit/ organisation (see above.)
- Internet access
- remote maintenance: maintenance of software (loading updates) done exclusively from the main site

Access to central resources

- remote control (remote control of the PC at the CWP (central workplace) from the TWP)
- TWP represents one node in the LAN – transparent access to all resources available in the LAN
- multiple file access possible
- maximum tolerable response times observed
- maximum number of de-central co-workers who can access the LAN at the same time in line with requirements

- maximum data volume per co-worker in line with requirements

Requirement catalogue verbal communication

Basic functionalities

- contact by phone at teleworkplace and office workplace under the same number
- call re-direction central office => teleworkplace
- can be operated from the office
- can be operated from the teleworkplace (follow-me-function)
- Are the following functions required:
 - call waiting
 - call brokering
 - automatic transfer on ring
 - automatic call return
 - (automatic) re-dial
 - three way telephone conferencing
 - call forwarding of an incoming external call to an internal branch exchange
 - call forwarding of an incoming call to an external connection
 - (optional) call number forwarding
 - call number storage (sufficient memory)
 - individual speed dial
 - central speed dial (calling the branch exchange number is sufficient)
 - call barring
 - call listing (display of last x callers)
- voice mail (central voice storage system or answer machine)
- least-cost-routing

Team integration

- integration in a mixed pool group (SA group) (participants of SA group are made up of co-workers of the main site and teleworkers)
- integration in ACD-group (Automatic Call Distribution)
- monitoring of TWP telephones by co-workers from the central office (co-workers in the central office can see on their phones if the teleworkers receive calls and if they are already on the phone)
- cyclical/ hierarchical call forwarding (calls to the pool number are forwarded to SA-members)
- call forwarding within the SA group on no answer
- call forwarding if engaged (if the teleworkers are on the phone, calls are forwarded within the SA group)

- temporary signing out of the SA group

Analysis/ Control of call behaviour at the (tele)workplace

- separate analysis of private and official calls/faxes etc
- connection charges charged to the organisation
- involvement of teleworkers in analysis of telecommunication charges
- operator connected or direct dialled telephone access

**Checklist 4: Checklist for the Introduction of Telework in SMEs
(for use in phase 3:concept)**

Preparation/The beginning				
1	Has management made a decision in principle in favour of telework?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ initially introduce telework for a limited time only	<input type="checkbox"/> not known ⇒ prompt management to comment
2	Are all those concerned aware and motivated?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ informational meetings ⇒ presentation of successful practical examples from other businesses	<input type="checkbox"/> not known ⇒ organise discussion forums ⇒ seek individual talks ⇒ consider carrying out interviews
3	Are the organisation's relevant decision makers (data processing, human resources, organisation, data protection) involved in the design of telework?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ form a project team involving management and users	<input type="checkbox"/> not known ⇒ check
4	Is there a lead player in the organisation who actively pushes the topic forward?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ determine in individual talks who could take on this role	<input type="checkbox"/> not known ⇒ check
5	Are the responsibilities unambiguous and transparent for all involved?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ carry out project planning ⇒ determine a timetable with responsibilities	<input type="checkbox"/> not known ⇒ check
6	Are sufficient human resources available to accomplish the implementation on schedule (particularly data processing)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ revise project planning ⇒ determine a realistic timetable ⇒ consider possible technological problems	<input type="checkbox"/> not known ⇒ test in personal conversations or with questionnaires
7	Have the objectives for the implementation of telework been formulated?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ discuss objectives and document ⇒ define success criteria ⇒ determine date for checking whether objectives have been achieved ⇒ determine k.o.-criteria which lead to a termination of the project	<input type="checkbox"/> not known ⇒ establish in discussion forums whether there is agreement on objectives ⇒ check whether objectives are understandable for 3 rd parties and documented comprehensibly

8	Is the works council informed and included in the decision making process?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ determine position of the works council in individual talks ⇒ offer participation in the project team	<input type="checkbox"/> not known ⇒ determine
9	Is there sufficient knowledge in-house for the proper design of telework?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ seek sources of information ⇒ consider involving an external consultant	<input type="checkbox"/> not known ⇒ identify knowledge gaps in the project team ⇒ determine need for consultation and seek internal information sources
Person related aspects				
10	Has it been established whether telework should be fixed location only (at home) or also mobile?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ carry out a workplace needs analysis ⇒ determine requirements ⇒ construct technological concept accordingly	
11	Have times of teleworkers' attendance at the main office been determined ("telework model")?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ carry out a communication analysis ⇒ establish a telework model ⇒ discuss times when contactable	
12	Has the circle of participants been determined?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ define selection criteria ⇒ carry out selection with consideration of the double voluntariness principle	
13	Has it been determined who will be considered for teleworking under which circumstances?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ determine selection and k.o.-criteria and pass them on to staff giving reasons ⇒ define conditions for increasing teleworkplaces numbers	
14	Are all staff aware of telework and the arrangements in the organisation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ carry out informational meetings (eg as part of a works council meeting) ⇒ open information policy	<input type="checkbox"/> not known ⇒ check with team leaders in individual talks
15	Have teleworkers got a good command of the applications (software and hardware) which will be used at the teleworkplace?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ carry out training ⇒ consider hiring external trainers	<input type="checkbox"/> not known ⇒ carry out trial sessions at a test workplace ⇒ determine training needs

16	Can teleworkers organise and motivate themselves sufficiently well?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ develop human resource measures ⇒ consider carrying out training through external experts	<input type="checkbox"/> not known ⇒ interview teleworkers' supervisors ⇒ interview those in charge of human resource development ⇒ carry out self-assessments
17	Do staff remaining in the office know what changes will occur with the introduction of telework?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ carry out discussion forums with all staff of each work team ⇒ avoid the impression that everything will remain as it is	<input type="checkbox"/> not known ⇒ point out the need for information to manager ⇒ find out in individual talks
18	Have all relevant departments (data processing, human resources, organisation, specialist departments) nominated contact persons whom staff can contact regarding questions on telework?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ designate people with sufficient understanding of the project planning	<input type="checkbox"/> not known ⇒ check
Organisational aspects				
19	Can work processes be transferred to telework without any changes?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ adapt work processes to telework, or re-define job share ⇒ determine demands on technological equipment from this	<input type="checkbox"/> not known ⇒ record status quo of conventional work methods and analyse with regard to needs for change (workplace assessment)
20	Are all staff aware of their responsibilities and tasks?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ discuss job share in the team ⇒ clearly define responsibilities	<input type="checkbox"/> not known ⇒ discuss job share in the team ⇒ if individual members of staff think their position has deteriorated consider discussing openly

21	Is the organisation's internal communication flow guaranteed?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ check telework model, if necessary plan more office work days ⇒ check implementation of technology at the teleworkplace ⇒ implement new communication technologies (E-mail, groupware, video conferencing) ⇒ structure internal communication more tightly, plan more meetings	<input type="checkbox"/> not known ⇒ carry out workplace assessment
22	Is communication with external partners assured?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ check implementation of technology at the teleworkplace ⇒ implement new communication technologies (E-mail, groupware, video conferencing) ⇒ establish compatibility with the partners' communication technologies	<input type="checkbox"/> not known ⇒ carry out workplace assessment
23	Will teleworkers have access to all necessary work materials (e.g. documents)?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ increase digitalisation of documents and make them available on the server ⇒ replace paper-based document flow with E-mails ⇒ designate a co-worker who can help out if necessary	<input type="checkbox"/> not known ⇒ carry out workplace assessment
24	Do teleworkers still have their previous workplace (desk) available in the office?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ organise multiple utilisation (desk sharing) ⇒ prepare occupancy plans ⇒ discuss the effects on the teleworker's identification with the organisation	<input type="checkbox"/> not known ⇒ discuss multiple utilisation (desk sharing) of the office workplace ⇒ make decisions for and against

Legal aspect				
25	Have teleworkers signed an additional agreement as a supplement to their contract of work where the principal changes are regulated?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ draft an agreement (human resources department) ⇒ in it set out rules for working hours, performance control, time recording, reimbursement of expenses etc ⇒ explain agreements to future teleworkers and have them sign agreement	
26	Does the works council waive the need for a workforce agreement on telework?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ obtain workforce agreements from other organisations ⇒ prepare a draft ⇒ discuss points of dispute, if necessary formulate a temporary agreement ⇒ explain and give copy of agreement to future teleworkers	<input type="checkbox"/> not known ⇒ initially do not plan a workforce agreement ⇒ cover need for regulation in agreements in addition to the contract of work
27	Is who carries the cost of telework clear and unambiguous?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ set out in individual legal agreements or in a workforce agreement ⇒ in cases where assistance with rent is demanded refrain from telework	<input type="checkbox"/> not known ⇒ check existing rules
28	Is the equipment at the teleworkplace insured?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ consider taking out an equipment insurance	<input type="checkbox"/> not known ⇒ check equipment insurance
29	Did teleworkers give permission for access to employer representatives and state authorities in individual contracts?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ include in an addition to the contract of work ⇒ if refused refrain from telework in the cases concerned	<input type="checkbox"/> not known ⇒ check
30	Has the employers' association been informed about setting up the teleworkplace?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ inform the employers association informally about the number of the teleworkplaces set up	<input type="checkbox"/> not known ⇒ check
31	Have teleworkers been informed about the regulations of employment legislation?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ inform actively	<input type="checkbox"/> not known ⇒ check knowledge

32	Do teleworkers have furniture available which conforms to the legal standards?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ consider providing teleworkers with furniture	<input type="checkbox"/> not known ⇒ in a questionnaire ask future teleworkers about the conditions for setting up a teleworkplace
33	Do teleworkers know how to set up their workplace with regard to ergonomic aspects?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ make information material available ⇒ offer advice ⇒ offer on site inspection	<input type="checkbox"/> not known ⇒ check knowledge
34	Do teleworkers know what measures to avoid accidents they have to take into consideration	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ make information material available ⇒ offer advice ⇒ offer on site inspection	<input type="checkbox"/> not known ⇒ check knowledge
35	Have conditions for the termination of telework been regulated unambiguously?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ determine conditions where the co-worker no longer wishes to telework as well as for termination by the employer ⇒ in case of termination resolve terms particularly regarding period of notice and return of equipment	<input type="checkbox"/> not known ⇒ check
Technological aspects				
36	Are the requirements for functionality of the teleworkplace determined in detail?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ carry out a technology requirement assessment ⇒ determine the technological equipment need of the teleworkplace in the home and the mobile workplace (hardware, software communication services and terminals)	
37	Have the effects of the chosen technology concept on the cost of telework been calculated?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ calculate costs ⇒ in particular calculate online costs in light of projected user behaviour	
38	Do the teleworkplaces have the necessary network connections (e.g. ISDN) available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ apply for ISDN-connection in good time	<input type="checkbox"/> not known ⇒ in a standard questionnaire ask future teleworkers about the conditions for setting up a teleworkplace

39	Are all requirements for connecting the teleworkplaces met at the central site?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ check telecommunications equipment and expand if necessary ⇒ finish other preparatory work (eg installation or expansion of router)	<input type="checkbox"/> not known ⇒ carry out a technology requirement assessment
40	Has purchase of equipment and its installation on site been arranged?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ obtain quotations, arrange provision ⇒ determine by whom, when and how installation will be carried out ⇒ agree dates with co-workers	
41	Are only familiar applications used at the teleworkplace?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ carry out training ⇒ set up a test workplace	<input type="checkbox"/> not known ⇒ carry out a workplace assessment ⇒ establish individual knowledge by self-assessment (questionnaire)
42	Will teleworkers receive adequate help with technological problems immediately?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ determine responsibilities for maintenance and repairs ⇒ install a hotline ⇒ determine a contact person for times when the hotline is not staffed	<input type="checkbox"/> not known ⇒ act out scenarios ⇒ define support requirements
Data protection & data security				
43	Is work at the teleworkplace in line with the organisation's internal data security standards?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ test data security concept ⇒ in addition determine, agree and pass on adequate rules of behaviour regarding data protection and data security	<input type="checkbox"/> not known ⇒ design a data security concept ⇒ test teleworkplace accordingly
44	Is work at the teleworkplace in line with the legal provisions for data protection?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ update data security concept ⇒ modify the range of activities at the teleworkplace so that data protection is not jeopardised ⇒ consider refraining from telework	<input type="checkbox"/> not known ⇒ check whether personal data is processed ⇒ test existing data security concept

45	Do teleworkers know how to ensure the necessary level of data protection and data security?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ establish rules for behaviour ⇒ actively communicate rules for behaviour to staff ⇒ have an agreement on data protection and data security signed as part of the contract of work	<input type="checkbox"/> not known ⇒ check knowledge
46	Are documents with confidential or personal data transported in a secure way?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ check other methods of transport (e.g. in-house courier service) ⇒ make lockable containers for transport available ⇒ consider refraining from working on these documents at the teleworkplace	<input type="checkbox"/> not known ⇒ check whether personal data is processed
Control of success and support				
47	Is known how economic profitability will be determined?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ determine criteria for profitability ⇒ determine one off and running costs and uses of telework	
48	Are changes in the productivity of the teleworkers measured?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ determine criteria for productivity ⇒ consult works council regarding agreement to survey ⇒ carry out survey	
49	Are there mechanisms to identify possible negative effects of telework in the social area at an early stage?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ determine and implement mechanisms for evaluation (eg questionnaires, intensive interviews) ⇒ consider using external experts for the evaluation	
50	Is management's information need to decide on expansion of telework known?	<input type="checkbox"/> Yes	<input type="checkbox"/> No ⇒ determine success criteria and agree with management ⇒ determine and introduce mechanisms for measuring the criteria	