

REPORT OF THE TASK FORCE ON STRUCTURE AND SERVICES

INTRODUCTION

At its June 2000 meeting, at the suggestion of the Finance Committee, the Unitarian Universalist Association's Board of Trustees authorized the creation of a task force to examine delivery of services to our congregations. The Board charged the task force with developing recommendations for improvement of service delivery as well as creating a process to foster the development of existing and new congregations. The Board asked the task force to specifically examine the following areas:

- current UUA staffing, staff structures, and service delivery patterns;
- the experiences of current off-site staff
- the best location(s) for lay leader education center(s);
- the possibility of a social justice center in Washington, D.C.;
- the experiences of UUA congregations, clergy, and lay leaders; and
- the experiences of other denominations and nonprofits in managing off-site employees.

The Board directed the task force to present options and recommendations, along with projected costs, at its June 2001 meeting.

The UUA moderator, Denny Davidoff, was asked to appoint task force members. They are: Wayne Clark and Kay Montgomery, co-convenors; Roger Comstock; Denny Davidoff; Makaanah Morriss; David Sammons; and John Weston. Meetings were held September 27-29, 2000, in Boston; December 5-6, 2000, in Boston; February 6-7, 2001, in Dallas; March 19-20, 2001, in Phoenix; and on April 24, 2001, in Boston. Ed Landreth worked with the task force to provide support for financial analysis. Gini Courter and Patti Lawrence, representing the Finance Committee, met with the task force for a portion of one of its meetings.

The task force members clarified the purpose of the task force by creating the following statement:

Given all the work being done by Unitarian Universalist stakeholders, our purpose is to create a road map for the next five years that will guide the Board and administration in reallocating resources to provide more accessible consultation and leadership training services for all sizes and locations of congregations, more efficient resources and program development, and an ecologically sound service delivery system, so that Unitarian Universalism flourishes.

The task force members created a working covenant and sought information and feedback from selected stakeholders. Throughout the task force's work, members utilized

a collaborative and participatory process. Numerous focus groups were convened to discuss the work of the task force as it was in process. Individuals with appropriate roles or backgrounds were interviewed. A survey was conducted of ten other denominations concerning their structures and experiences with off-site staff. A great deal of research was done on current management thinking about staffing structures and service delivery.

We note with pleasure that a number of other analyses and reports conducted concurrently with this one support and complement the findings of our task force. These include the "To Be of Use" report, the report titled "Information Technology Services and the UUA," a staff work/culture survey conducted by the Stubblefield-Tave Group, the Leadership Training Stakeholders Gathering, a salary and grading analysis of UUA staff positions, and the UUA staff strategic plan.

The final recommendations of the task force are contained within this report, including cost estimates for the early stages of implementation and financial implications for many of the recommended changes (see Appendix A). It should be noted, however, that our recommendations are general, designed to provide overall guidance in creating specific initiatives for better service to our constituents and a better trained, supported, and flexible work force. We are aware that implementation will be influenced by other work under way, by financial exigencies, and by emerging plans and commitments.

We offer this report with enthusiasm and the belief that the "road map" we have created will support the health and growth of Unitarian Universalism as it moves into the twenty-first century. It comes with our thanks to the hundreds of people who offered insights and course corrections to our work.

Faithfully,

Wayne Clark
Roger Comstock
Denny Davidoff
Kay Montgomery
Makanah Morriss
David Sammons
John Weston

EXECUTIVE SUMMARY: RECOMMENDATIONS

I. Create a Culture of Communication and Collaboration

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Our vision is the development of new images and models to overcome a historic culture of departmental isolation. We recommend an intentional, comprehensive education program for executive staff, departmental staff, and district staff that will focus on creative organizational development, followed by consultative assistance as new models are implemented. We also recommend the creation of systematic evaluation processes for staff accountability directly related to the quality of services provided to our congregations.

II. Develop Standards of Infrastructure and Support for all UUA staff

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Our vision is that all UUA staff members will be provided with equity in compensation, benefits, technical innovation and support, office equipment, and supplies regardless of their geographic locations. With 25 percent of the UUA staff currently located off-site, the development of these standards will assist *all* staff in providing high-quality services to our congregations.

III. Support Ongoing Initiatives

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We strongly support two initiatives that are already in progress:

A. Increase the number of geographically dispersed UUA staff members.

The UUA should continue to support greater geographical dispersal of its staff. We believe that work should be something that you do, not a place where you go. By recruiting more off-site staff, we expect to attract a wider pool of highly qualified candidates who will be attracted to increased freedom, autonomy, and control over their work conditions.

B. Create a comprehensive congregational and district leadership development plan.

Leaders, lay and ordained, should be offered increased opportunities to develop their leadership skills. We recommend the creation and gradual implementation of a comprehensive leadership development plan.

IV. Strengthen UUA District Structure

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We recommend that districts continue to function as primary service delivery centers and

governance units. Any changes in the district structure should be evolutionary in nature. In order to strengthen the districts, we recommend including field staff in the intentional, comprehensive education program outlined above.

V. Create Centers of Expertise

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We envision the evolution of centers of expertise for the association, with each center including a staff team focused on a specialized function, such as social justice advocacy, leadership development, religious education, or ministry. These centers might create relationships with existing programs, such as the UUA Washington office, Meadville/Lombard, Starr King, The Mountain, or the Alban Institute. Each center might include an office with access to classrooms and an auditorium. Each center would need to provide technology to facilitate distance-learning opportunities. These centers of expertise might be located in Washington, DC; Chicago; the West Coast, the South, and the greater Boston area. We do not envision these centers replacing districts; nor do we see them as units of governance.

VI. Keep 25 Beacon Street; Explore Alternatives to Other Boston Property

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We recommend that the UUA continue ownership of 25 Beacon Street and that '25 Beacon' continue to be the historic and symbolic center of the Association. Some staff would continue to work there, while others would be located in the centers of expertise, certainly in districts, and as off-site employees. '25' should provide facilities (tours, historic, and archival information, etc.) for visiting Unitarian Universalists. We recommend that Beacon Press remain in Boston though not necessarily in its current location. We do not assume that, over time, the current Boston buildings--other than 25 Beacon Street--would be kept by the Association.

Appendices

A. Financial Implications

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B. Resources

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C. Principles for Off-Site Work Forces

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I. CREATE A CULTURE OF COMMUNICATION AND COLLABORATION

The UUA historically has used a classic departmental structure for its internal organization. Such a structure has served the Association well by attracting staff with high levels of expertise in given areas. The departments have been able to offer focused attention in specific areas of congregational ministry (for program departments and in districts) and administrative service and support to UUA Boston and off-site staff (for administrative, financial, and communication departments). Programs and resources have been developed, initiatives begun, publications produced to benefit congregations and their leaders.

However, our congregations are currently facing many complex problems and would be better served by a UUA multidisciplinary team approach. Whether size-specific challenges to congregations (small, medium, large congregations), or enhancing outreach and program for certain targeted age populations (e.g. youth, young adult), or a transformational initiative such as Journey Toward Wholeness, the organizational responsiveness of the UUA would be greater if it had a broader and more flexible range of expert configurations from which to draw.

For instance, teams that include a variety of experts from Ministry, Religious Education, Faith in Action, District Services, and Information Technology Services could offer a much more comprehensive approach to a given problem. At times a team of two or three staff might be used and in other situations a larger team might be created. Certainly individual staff members' work with individual congregations and leaders would also continue to be an important service component.

The current departmental structure at times leads to a kind of “silo” mentality, with few organizational structures available to encourage or enable cross-departmental and cross-district team formation and work. Departments experience themselves as being in competition for budgetary, personnel, and other key resources. The strategic goals of individual departments do not necessarily coincide with or even complement goals of other departments. To be sure, such goals are shaped to better serve member congregations, but such service is at times limited when viewed from only one departmental perspective.

UUA staff, whether on-site, off-site, or in districts, are currently encouraged to maintain close and effective communication within their departments but not necessarily between or beyond departments. Departments are physically assigned to separate floors or specific parts of certain floors, and with few opportunities for even “lunchroom” interaction, staff from different departments often have very little contact with each another. And yet each department offers talents and skills that could generate amazingly innovative solutions and resources for congregations when complemented by talents and

skills of staff in other departments. As we enter this new millennium, it seems an auspicious time to reach beyond our current departmental structures.

The theory, knowledge, and skills for such creative organizational change are available as organizational theory, research, and practice in both the profit and nonprofit sectors over the last twenty-five years have yielded insights the UUA could use to good advantage.

We suggest that this particular juncture in time, with the election of a new president and moderator and with several key executive staff positions open, seems optimal for the UUA to pursue an intentional, comprehensive education and consultation program focused on creative organizational development.

Such a program might involve several phases. A sample scenario might be that the President, executive staff, and perhaps a board member or two engage in an initial intensive education and strategic visioning session with an outside consultant, from which might emerge beginning images for creative alternative staffing structures to complement the current departmental structure. Departmental staff (on-site, off-site, and district) could be invited to join executive staff for the second phase of work, which would include significant time for those staff members to offer first-hand input as well as an educational component offering training in the skills needed to implement new working structures. The third phase might involve continuing work with the consultant over the following six to eight months as new teams and ways of working together are put into place. Coaching and assistance in how to effectively re-shape certain areas would help to maintain the momentum and learning modality as the UUA developed a greater range of creative structures with which to meet the changing needs and challenges of its member congregations.

In addition, we recommend the creation of a systematic evaluation process so that staff accountability can be more directly correlated to the quality of services we provide to our congregations. We suggest an evaluation process that describes specific programs and structures and then clearly defines desired outcomes. We suggest implementation of an evaluation process that describes measurable outcome indicators, develops a plan for using each indicator to evaluate each outcome, and gathers data on those outcome indicators. And we suggest an analysis of the evaluation process that assesses the extent to which programs have achieved outcomes so that future plans can be based upon the results of the evaluation.

II. DEVELOP STANDARDS OF INFRASTRUCTURE AND SUPPORT FOR ALL UUA STAFF

In serving the needs of its member congregations, the UUA acts primarily as a conveyor of information to congregational leaders, ordained and lay. The value of information to those leaders depends not merely on its accuracy and suitability to the congregational context and its timeliness, but also on its felt relevance. Its capacity to be heard,

accepted, and applied is profoundly determined by the quality of the total human interaction in which the information is conveyed. To so state the obvious illuminates the dependence of the value of information on the human vehicles—the UUA staff members—supplying it.

Staff members dealing with complex situations must be rich in education, training, experience, and personal qualities that equip them to serve congregations well. They must bring their full attention to situations to which they are asked to respond, or which they enter on initiative. They must be timely. And from the beginning of the interaction to its end, staff members must be present in such a way that they are experienced as knowledgeable, sensitive, attentive, and responsive by the individuals concerned. Only then is the information experienced as relevant. It is thus not overstating the case to say that the value of information conveyed to congregational leaders is no greater than the quality of the UUA staff and the adequacy of the infrastructure that supports the staff.

Our vision for the standards to be developed is twofold. First, all UUA staff should be provided with equity in support, compensation, and benefits, regardless of their geographic locations. Only thus can we maintain the quality of our staff. Equity in support includes equity in supervision, evaluation, and administrative assistance; equity in opportunities for collaboration, collegial relationships, and participation in special projects; equity in the potential for career advancement; and equity in being informed and “in the loop.” Equity in compensation takes into account prevailing wage rates in the geographical area of employment, as does the Board of Trustees’ recommendation that congregations’ compensation plans for ministers and church staff take into account local wage rates. We must also maintain equity in insurance, pension, and professional and business expenses as well.

Second, all UUA staff must be provided with the technical means to enable them to convey information in the most effective ways possible. Only thus can staff members perform at their potential. As a recent “Information Technology Services and the UUA” report indicates, the UUA needs to “rethink how it uses information and access to it . . . recasting Information Technology as an enabling partner to each of the UUA units.” Implementing the recommendations of the IT report will dramatically strengthen the information and communication infrastructure of the UUA, permitting staff members to convey information with the greatest possible felt relevance.

All staff members must have ready access not only to up-to-date computer equipment, appropriate materials on the UUA servers, and full IT support, all on an “as any other employee” basis, but also to appropriate meeting space, proper supplies, and adequate printing, duplicating, fax, and telephone equipment.

It is important to recognize that, especially for youth and young adults, distance and communication are not in opposition. Nor are sophisticated information and communications technologies a bandage, making a poor situation tolerable until healing can occur. They are healing in themselves, providing for connection and collaboration where once there was removal, even estrangement. Their promise lies not in the future,

but in the present. Every day that inadequacies and inequities in infrastructure continue, opportunities are lost forever.

With 25 percent of staff currently located off-site, the development of these standards of support and infrastructure will enable the UUA to continue to recruit, hire, and retain staff members with the requisite education, training, experience, and personal qualities that make them valuable to congregations, and will equip them, wherever they may be located, with the tools to serve congregations well.

III. SUPPORT ONGOING INITIATIVES

A. Wider Geographic Distribution of Staff

Task force members envision a future in which work will increasingly become something that the UUA staff does, rather than a place where they go. The task force recognizes that the current UUA staff is a dedicated, highly skilled group. We envision committed employees providing effective services to our congregations; strong skills and passionate dedication of employees far outweighs their specific locations.

Currently, 25 percent of UUA employees work in locations other than Boston. Task force members believe that there will be a higher percentage of off-site employees in the future. The task force members further believe that as Unitarian Universalism continues to grow, the UUA will need to hire additional staff.

The current Boston facilities are over-crowded, with some employees located in inordinately small workspaces. In addition, there is a shortage of group meeting spaces and training facilities. The purchase of additional Boston property is unlikely because of the prohibitive expense. All of these factors contribute to a belief that much of any future staff growth will need to occur outside of Boston.

In spite of these concerns, the primary reason for this recommendation is not based upon our inadequate Boston facilities. The task force members believe that there are several advantages to locating more employees off-site.

Thorough research of the existing management literature (Appendix B) indicates that there might be several other benefits to recruiting more off-site staff. The UUA would be able to attract a wider pool of highly qualified candidates who will be attracted to increased freedom, autonomy, and control over their work conditions.

Beyond the clear advantage of an increased pool of qualified candidates, the literature indicates that the UUA, as an organization, can expect some benefits from an increase in off-site employees. Anticipated benefits include lowered cost of real estate, decreased time away from work due to sickness, decreased health care costs, a reduced rate of employee turnover, increased access for mobility-impaired employees, increased productivity, and the creation of a coaching and guiding model of management.

It must be noted, however, that the task force members are clearly aware that there can be barriers to increasing the number of off-site employees. The literature indicates that off-site employees, other than those who might be located in centers of expertise, may experience a loss of traditional office perquisites, limited home office space or a distracting family environment may hamper their effectiveness, and they may miss the loss of daily person-to-person contact with colleagues. And finally, some off-site employees may suffer from inadequate development of socialization skills in an organization as they find it difficult to learn about the organizational culture of the UUA.

On balance, however, the task force believes that the benefits of an increased number of off-site employees far outweigh the potential barriers. Part of creating a culture of communication and collaboration (see Recommendation I) is an opportunity for off-site employees to work cross-departmentally. Employees would then have links with a variety of Boston-based staff as well as with other off-site employees.

The task force members also understand that there are some key principles to consider if a commitment is made to increasing the number of off-site employees. The literature is clear that off-site workers must be chosen carefully, using clearly defined criteria. Individual contracts must be created for each off-site situation. We do not recommend establishing off-site working conditions except at the wish of the employees involved.

Organizationally, there are also several key principles to consider. The literature suggests that a coaching and guiding management model will need to be implemented. Existing human resources policies and support will need to be adapted. Appropriate technological and telecommunications support must be provided to each off-site location, especially within the centers of expertise. Jointly developed, performance-oriented evaluation procedures will be important and it will be necessary to create a production-oriented method of evaluation for each specific situation. A system of frequent feedback will need to be designed and implemented and a consistent schedule of communication, including periodic in-person contact, will need to be developed.

In summary, the task force members envision a UUA staff with a significant number of off-site employees. The members believe that these highly qualified service providers will enhance an already high level of staff responsiveness to the concerns of our congregations.

B. Leadership Training and Development

A great deal of effective lay leadership training happens now within the UUA; sponsored by districts, by groups of districts, by UUA departments, and by leadership schools. However, these different trainings are not well-coordinated, and good mechanisms for reaching a broad number of lay leaders at a reasonable cost, establishing standards and evaluating trainings, recruiting and training trainers, providing recognition for those who

have successfully completed trainings, recognizing and filling gaps, and providing continuity are not in place.

In February, 2001, the Department of Congregational, District, and Extension Services sponsored “A Stakeholders Gathering: Leadership Development and Training” as a response to one of the objectives of the UUA Executive Staff Strategic Plan (October 2000). Some 25 Unitarian Universalists with expertise in the field were invited to attend this three-day event.

The report of that gathering calls for “a system for coordinating lay leadership development and training” with the following goals:

- Coordinate the delivery of trainings by departments and Districts.
- Develop and maintain a database on training opportunities available within the denomination.
- Use the UUA's perspective on congregational life to guide us in offering trainings with the breadth, depth, and variety needed.
- Develop standards and evaluation mechanisms, as well as processes for recruiting and training trainers.
- Develop a means of accountability to users.
- Promote and publicize both the need and opportunities for such trainings.
- Develop new training experiences.
- Develop a grant/commission program to support the work identified.
- Develop a means of recognizing accomplishment by lay leaders

The Task Force on Structure and Services wholeheartedly supports this set of recommendations. And we believe that it should be extended to include the training of ordained leadership as well as of laity. Such a plan should be designed and implemented carefully over a five-year time period.

IV. STRENGTHEN DISTRICT STRUCTURES

Since the inception of the new District Executive program in 1985, field staff have been generally well-received in the districts and by our congregations. The program has grown in that time from six interdistrict representatives paid by the UUA and four consultants paid by their districts to thirty-two professionals (thirty-one positions) jointly paid by the districts and the UUA. During those sixteen years, the District Services line in the UUA budget has grown considerably. A major enhancement to the service capability of the field staff was created when the UUA began adding program consultants to serve some districts in 1994. There are now ten such positions in place.

While there are differences among districts in membership, number of congregations, geographic size, and financial strength, strong allegiances to the present structure have developed. Generally, there is no desire evident to change that structure. This proposal

does not envision any specific changes in the structure. Some changes are already under consideration, and others may come about organically. Our hope is that the centers of expertise proposed in this report will serve to enhance the delivery of services to congregations, not replace the field staff system already in place.

Our vision is that creative ideas will evolve that will provide still more effective service to congregations. For example, field staff occasionally help each other across district lines by bartering field staff time based on specific expertise; discussion is underway about formalizing this arrangement.

Currently, field staff are expected to take extension training, conflict management training, anti-racism training, and training for safe congregations/ministerial sexual misconduct issues early in their employment. Other trainings are conducted as part of the annual gathering of field staff while still others are supported by the CD & E continuing education budget. New field staff are brought to Boston for orientation. Our recommendation for including field staff in the intentional, comprehensive education program described above is aimed at improving the consistency, responsiveness, and accountability of District Services.

V. ESTABLISH CENTERS OF EXPERTISE

Our vision is that the Unitarian Universalist Association will better serve its member congregations scattered across the continent by locating more of its services in areas other than Boston. We also believe that locating more services beyond Boston will carry symbolic value, providing tangible witness to the broad geographic dimension of our movement.

The Washington, D.C., Office already serves as a small "center of expertise." In addition we have scores of UU-related summer camps and conference centers such as The Mountain, Star Island, and Ferry Beach plus the UU-related seminaries in Chicago and Berkeley, several UU-related community ministries, and a number of "cathedral" churches.

Regionalization has long been a feature of Unitarian Universalist thinking. At the time of consolidation, about seven or so regions were contemplated, with districts distributed among them. Thirty years ago, at a time of great financial exigency, the UUA replaced paid district staff with inter-district representatives (IDRs), each serving a cluster of districts. In a few cases people were employed to help the new IDRs, particularly in the field of religious education; in others, such as on the Pacific Coast, the districts opted out of the program and hired field staff on their own. But the regional centers that the creators of the program had hoped would be developed never came into being. It was as though the "generalist" field staff were just given more churches to serve.

Although a report to the Board of Trustees in the early eighties recommended establishing regional centers as originally proposed, the wish for district-specific field

staff was so great that, in 1985, the UUA and districts joined forces to restore the funding for field staff in each of the districts (though with some doubling up). This structure continues to the present time though with some evolution: Two new districts were formed last year, each a consolidation of two pre-existing districts.

These forays and related considerations provided the background for our Task Force's look at the notion that we've come to call "centers of expertise."

We envision the evolution of several such centers, including a possible expansion of the current Washington Office. The same may well be true of a team brought together to work on leadership development, whether the team would be allied with The Mountain, which has the opportunity to develop a new training facility in Virginia, or elsewhere. A West Coast location such as Seattle or the San Francisco Bay area, or a Midwestern location could be considered. Such a center might also be linked to one doing similar work, such as the Alban Institute. Other possible images for centers might include a religious education team located in Chicago, allied with Meadville/Lombard, or perhaps in Berkeley, allied with Starr King and the Graduate Theological Union. There might be a center in the South or Southwest, say in Dallas or Atlanta, to house a team specializing in large congregations, and a center for small congregations in New England.

These centers of expertise would not replace districts, but they would do well to share facilities, equipment, and technology with a district, a seminary, another UU-related organization, one of our larger churches, or a non-UU organization doing related work. Each center should at least have access to classrooms, group meeting space, and an auditorium. Each should also have whatever is necessary to provide congregations with distance learning, whether on its own or by means of staff and equipment provided by some other institution, such as a college. Centers might also provide "hoteling" facilities-office space and the technological support for other UUA staff working in the area.

Since the centers would be extensions of the UUA, rather than independent entities, the UUA would provide the staff and administrative support needed. Appendix A provides an estimate of what it would cost to have staff working in such a setting. We recommend moving toward these centers intentionally and systematically, beginning with one center and taking advantage of existing energy and enthusiasm.

VI. KEEP 25 BEACON STREET; EXPLORE ALTERNATIVES TO OTHER BOSTON PROPERTY

The Task Force examined the current use of our properties in Boston and considered future usage. These properties include:

- 25 Beacon Street, the headquarters for the American Unitarian Association since 1927 and of the Unitarian Universalist Association since consolidation in 1961. This property currently houses approximately eighty-three UUA staff members.

- 41 Mt. Vernon Place, a building purchased in 1997, replaced properties at 53 Beacon Street, which had been used for office space, and at 8 Mt. Vernon Place, which had for many years housed Beacon Press staff. 41 Mt. Vernon Place currently houses approximately sixty-eight UUA staff members, including Beacon Press and the departments of Congregational, District and Extension Services; Faith in Action; Ministry; and Religious Education.
- 6 and 7 Mt. Vernon Place (Pickett and Eliot Houses) are two connected buildings currently serving as a bed and breakfast--type facility, providing meeting space and lodging for the UUA Board, UUA committees, and persons in Boston on Unitarian Universalist--related business as well as temporary office space for off-site employees when they are in Boston.

25 Beacon Street

The task force invited commentary on our presence in Boston from approximately fifteen people, chosen for their knowledge of the Association and their ability to assess the importance or lack of importance of maintaining a presence in Boston (three of these papers are available on the UUA's website at <http://www.uua.org/TRUS/taskforce1.html>). While these opinions were far from unanimous, the members of the task force ultimately concluded that 25 Beacon Street should be maintained as the historic center of the Association--certainly for administrative staff for the near future and, even assuming that most staff reside elsewhere eventually, as a locus of history that might house a chapel, a museum, archival information, classrooms, and perhaps offices for off-site staff members when they are in Boston.

41 Mt Vernon Street

While we do not imagine selling 41 Mt. Vernon Place in the near future, we do propose that as time passes and more staff and departments are located in places other than Boston, this building might be sold with the understanding that offices for Beacon Press staff would need to be housed in the Boston area in order to maintain Beacon's viability in the publishing community.

6 and 7 Mt. Vernon Place

We propose that a tight analysis be done of the consequences of maintaining these buildings. While there does not seem to be substantial savings to be gained by the sale of them at this time, we do believe that maintaining them perpetuates a feeling that the UUA is Boston-centric and that there would be significant benefits to be gained from the UUA Board and other committees meeting throughout the country. And, finally, we would suggest that there seems to be lack of connection between our commitment to issues of race and class and our focus on Beacon Hill in Boston as our staff center.

APPENDIX A: FINANCIAL IMPLICATIONS

Overview

This appendix expresses some of the financial cost implications implied in the adoption of the task force recommendations. The figures represented here are only best estimates. More exact numbers can only be developed when specific situations with known parameters are available. Thus, many of the numbers are shown as ranges, estimated to cover the range of situations most likely to occur.

Not all the costs listed will necessarily represent additions to the budget. In certain situations, the costs of an alternative may offset costs of some current operations that can be reduced or no longer needed. Also, some cost items appear under more than one recommendation; funding one recommendation may partially fund items within another recommendation.

Current Boston Based Staff Costs

To create some baseline data, research was conducted to determine the approximate current costs of operating the UUA Boston-based programs. The following assumptions were made:

- Square Foot measurement data of 25 Beacon Street and 41 Mt. Vernon Street was gleaned from the April, 1997 Office Space Comparison document, with extrapolations from floor plans of each building
- 2nd floor of 25 Beacon Street was removed from the calculations because it is considered public space, often used by task forces, committees and boards.
- The ratio of common space (hallways, rest rooms, stairways, elevators, etc) to total space (0.3) is the result of an average approximate measurement of the floor plans of two floors of each building. Because the floors are not exactly the same arrangements, the ratio is not exact.
- Building operation costs are the budgeted number for FY 2001, our current year of operation. Since our budgeting is reasonably accurate barring any unforeseen circumstances, these are reasonable numbers to use. Many of the budget items apply to both buildings (and even some to Mt. Vernon Place) but are not split out. The spreadsheet apportions those line items by total square footage of the two buildings.
- Building operation costs include the labor costs of maintaining the buildings.
- The interest expense is a result of the loans to obtain 41 Mt. Vernon Place. This expense is shown as a delta cost so that it may or may not be considered.
- The office area cost per employee has been calculated using the cost per square foot, including the 2nd floor of 25 Beacon Street. Thus the employee cost is not burdened by the cost of the 2nd floor, which is considered public space.
- Other support costs are gathered from the budget. The departmental costs are quite variable, depending on the specific programs of each department. The

typical departmental support costs are travel, telephone, print/copying, supplies and postage. The Beacon Press budget does not separate those costs so they are not included. General support costs such as human resources, payroll and computer benefits do not include the payroll costs of that support. Other payroll costs such as benefits, post retirement costs, and vacation accrual are not included.

- Per square footage per employee in the Boston facilities is within normal office norms. However, room configurations are inefficient, with many small offices creating inadequate office space for many employees.

Recommendation I: Create a Culture of Communication and Collaboration Among UUA Staff and Departments

The task force envisions the development of new images and models to overcome an historic culture of isolation. They recommend the creation of systematic evaluation processes so that staff accountability can be directly related to the quality of services provided to our congregations.

One quote for a consultation process includes the following estimates:

Consultant time	\$90,000
Lodging – Phase I participants (UUA president, executive staff, moderator	3,600
Lodging – Phase II participants (departmental staff and field staff)	21,600
Materials fee	6,750
 Estimated total	 \$121,900

Recommendation II: Develop Standards of Infrastructure and Support for all UUA Staff

The costs in the area will be connected primarily to increased funding for information technology. The recent IT "audit" suggested that adequate funding for IT expenses would be 3% to 5% of total budget and that personal computers should be replaced every two years. The figures below show current and proposed expenses for all technology-related areas (Department of Information Technology Services and Office of Electronic Communications) as well as for hardware purchases.

Current operating budget funding:	\$820, 000
Current capitalized funding	\$175,000
 Proposed operating budget funding (Beacon Press plus all UUA)	 \$720,000 to \$2,200,000
Proposed capitalized expenses	\$300,000

Recommendation III A: Increase the Number of Geographically Dispersed UUA Staff

The task force envisions a culture of work that becomes something that UUA staff members do, not a place where they go. The task force recognizes that the current UUA staff is a dedicated, highly skilled group. The task force envisions even more committed employees providing effective services to our congregations. The strong skills and passionate dedication of these employees will be far more important than their specific location.

To implement this recommendation, several assumptions have been made:

- Per person costs will vary in several dimensions, including the programmatic mission of that employee, the number and length of home office visits, the distance from Boston, availability of transportation between the locations and utilization of Boston based support services (human resources, payroll, phone, postage etc.).
- Ranges have been developed for the costs to provide for a majority of the variations.

Increasing the number of off-site employees will create additional costs, including:

Hoteling for 10 to 30 Boston based meetings each year

	Minimum	Maximum
Lodging	\$800	\$2,400
Food	300	900
Transportation (3-8 trips)	1,000	8,000
Local costs	100	600
Added computer support - laptop & home computer	\$3,000	\$5,000
Home office expenses (supplies, copying, postage)	\$ 900	\$2,400
Total annual added cost	\$6,100	\$19,300

General Observations

Increasing the number of off-site employees will not appreciably reduce total office costs. Almost all of the support cost is still there, especially travel, which is the largest cost item. In addition, it is important to note that the Boston building costs will not decrease if fewer employees work in Boston. The building costs are relatively independent of the building population

Recommendation III B: Create a Comprehensive Congregational and District Leadership Development Plan

The vision of the task force is that ordained leaders and lay leaders will be offered opportunities to develop their leadership skills. They recommend that a comprehensive leadership development plan be created, with the program being implemented gradually, over a five-year period of time.

The first year of this program might include some architecture work, including a couple of two day meetings of an architecture team (7 to 9 members) and development of materials needed to present the report to the Board and Administration. In addition, one or two resource development projects would be created during the first year of implementation. The initial implementation might also include modest administrative costs.

During the second year, a position for congregational and district leadership development might be created. Further development of projects, prioritization of resources, and marketing and administration would occur during this second year.

Estimated costs for the first two years of this program might include approximately \$40,000 to \$50,000 during the first year, and \$100,000 to \$150,000 during the second year. Some of these expenses could come from a reallocation of already budgeted funds.

Recommendation IV: Strengthen District Structures

Funding for this Recommendation is contained within Recommendations I and II.

Recommendation V: Explore the Possibility of Creating Centers of Expertise

The task force envisions the evolution of centers of expertise. Each center might include a staff team, focused on a specialized function. Each center might include an office with access to classrooms and an auditorium. Each center will need to provide technology to enable distance-learning opportunities.

To implement this recommendation, several assumptions have been made:

- The square foot office size has been based on industry norms
- Costs per square foot are based on urban areas, outside the “high rent districts”
- A range of costs has been provided
- It is assumed that most support functions (administration, human resources, finance) will remain in Boston
- It is assumed that each center will include at least three professionals and one support person.

Space required for each center:

	Minimum	Maximum
3 professionals @ 100 to 140 sq. ft.	300	420
1 support @ 80 to 120 sq. ft.	80	120
Reception area	100	150
Filing/equipment space	100	150
Conference room	<u>120</u>	<u>180</u>
Total space in square feet	700	1,020
Annual cost per space @ \$15-20/sq. ft	\$10,50	\$20,400
One time costs:		
Furnishings: desks, chairs, files, etc	\$.5,000	\$8,000
Equipment: copier, computers, etc.	18,000	26,000
Miscellaneous: decorating, flooring, etc.	<u>3,000</u>	<u>6,000</u>
Total one time costs	\$26,000	\$40,000
Annual operating cost:		
Utilities	\$3,000	\$5,000
Phone	1,200	3,600
Supplies, postage	900	1,600
Travel (to & from Boston)	3,000	12,000
Computer support	<u>3,000</u>	<u>9,000</u>
Total operating costs	\$11,100	\$31,200

[Note: Support costs per Boston based employee = \$7,700]

Recommendation VI: Keep 25 Beacon; Explore Alternatives to Other Boston Property

The task force has given some consideration to ways in which to fund centers of expertise. While there are undoubtedly a number of ways to fund these centers, one option might be to consider the sale of some UUA-owned Boston properties. Currently the UUA has four buildings in three Beacon Hill locations of Boston:

- 25 Beacon Street (UUA headquarters and offices)
- 41 Mt. Vernon Street (Beacon Press and UUA offices)
- 6 and 7 Mt. Vernon Place (Eliot and Pickett Houses, considered as one location).

As previously mentioned, the task force recommends the continued ownership of 25 Beacon Street. In addition, the task force proposes that the UUA, for the time being, continue ownership of the 41 Mt. Vernon Street property. However, the task force recommends that a tight analysis be done regarding the consequences of continued ownership of 6 and 7 Mt. Vernon Place.

The following analysis is a very rough first cut at the possible financial savings that might be gained by selling 6 and 7 Mt. Vernon Place.

Assumptions:

- Travel costs would be a wash. That is, total travel costs to a meeting in Chicago or Seattle will be similar to those to Boston on a long-term average
- Food would cost on average \$30 to \$40 per day (unless catered)
- There would be a staff member available to arrange meetings in various locations (maybe part of the GA office)
- Hotel costs would average \$80 per night in locations other than central metropolitan areas. A \$120 rate could be negotiated in Boston
- Half of the meetings now held in Boston will still take place in the Boston area. This proportion will decrease over time
- An eight month sample of 6 and 7 Mt. Vernon Place provides the following annualized data:
 - 77 meetings with 2616 person-nights stay
 - 458 individual person-nights stay
 - Total of 3074 person-nights stay
- Elimination of P&E would mean one-half of those person nights (1538) would go to other cities, while one-half would remain in Boston for the short term.

Current cost lodging 3076 person-nights at P&E	\$184,000
Projected FY 03 P&E shortfall (expense – income)	<u>37,000</u>
Total	221,000

Cost of 1538 p-n in Boston	\$184,000	764 p-n in Boston	\$ 92,000
Cost of 1538 p-n other loc.	<u>\$123,000</u>	2312 p-n other loc.	<u>184,000</u>
Total	\$307,000		\$276,000

Difference in hotel costs of other lodging vs. 6 and 7 Mt. Vernon	
One-half of meetings move out of Boston	\$86,000
Three quarters of meetings move out of Boston	55,000

Estimated proceeds from sale of 6 and 7 Mt. Vernon Place \$3 to 3.5 Million

Estimated income from invested proceeds \$150,000 to \$175,000

APPENDIX B: RESOURCES USED BY THE TASK FORCE

Background Materials

- Report from the 1988 General Assembly, Mary Bransen and Laura Fox.
- “Geographically Dispersed Teams,” Michael E. Kossle and Sonya Prestridge, Center for Creative Leadership, Vol. 16, #2/3, 1996.
- “Two Cheers for the Virtual Office,” Thomas Davenport and Keri Pearlson, Sloan Management Review, 1998.
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- “UUism in Societal Perspective,” Robert Bellah, UUA General Assembly, Rochester, N.Y., 1998.
- “Fulfilling the Promise: A Response to the Survey Results,” Clark Olsen, October 1998.
- “Using Brand Size to Grow U.S. UU Presence,” Author Unknown, July 2000
- “UUA Congregational Collaboration – Leveraging Technology and Roles, Author Unknown, August 2000.
- “Memorandum on Off-Site Staffing at the UUA,” Kay Montgomery, September 2000.
- “The Seventh Step,” John Weston, October 2000.
- “Survey of Religious Denominations/Associations,” Pam Bachman, October 2000.
- “Review of Literature on Remote Work Force,” Wayne Clark, October 2000.
- “A Survey of UU Surveys,” David Sammons, October 2000.
- “The UUA Presidential Election, A Saga in Several Parts,” Peter Raible, November 2000.
- “Discontinuity and Hope – Radical Change and the Path to the Future,” Notes from the Book by Lyle Schaller, Wayne Clark, January 2001.
- A UUA Guide to Services,” from the UUA Website, March 2001
- “Information Technology Services and the UUA – An Assessment of Performance and Role,” Kaludis Consulting, April 2001.
- *Tattered Trust: Is There Hope For Your Denomination?*, Lyle E. Schaller, Abingdon Press, 1996
- "Organizational and Staff Structures for Denominational Transformation," George W. Bullard, Jr., Net Results, September 1997
- Building Nurturing Relationships with Congregations," George W. Bullard, Jr., Net Results, August 1997
- Building Learning Relationships with Congregations," George W. Bullard, Jr., Net Results, July 1997
- Moving Denominational Service toward Mass Customization," George W. Bullard, Jr., Net Results, June 1997

- Reversing the Downward Spiral of Regional Denominational Structures," Alan Klass and Cheryl Brown, Net Results, July 1997
- "Leading from a Different Place: the Formation of a Learning Community of Practice in a Denominational Headquarters," Lawrence Palmieri Peers, July 1998
- "Working It Out: Making Flextime Fit," Diane E. Lewis, October 2000

- **Focus Groups**

- UUA Presidents' Council, Denny Davidoff and Kay Montgomery, November 2000
- Field Staff, Roger Comstock and Kay Montgomery, December 2000
- Regional Forum, San Francisco, David Sammons, December 2000
- UUA Board of Trustees, Kay Montgomery and Denny Davidoff, January 2001
- UUA Area Managers, John Weston and Kay Montgomery, January 2001
- UUA Employees Working with Off-site Staff, Denny Davidoff and Kay Montgomery, January 2001
- Faith In Action/Religious Education Departments, Denny Davidoff and Kay Montgomery, January 2001
- Congregational, District and Extension/Ministry Departments, John Weston and Kay Montgomery, January 2001
- Communications Department, Wayne Clark and Denny Davidoff, January 2001
- Development Department, Wayne Clark and Denny Davidoff, January 2001
- Administrative Staff, Wayne Clark and Denny Davidoff, January 2001
- UUA Washington Office, Denny Davidoff, January 2001
- UUA Board of Trustees, Kay Montgomery and Denny Davidoff, January 2001
- Portland, Maine Area Congregational Presidents, Roger Comstock, January 2001
- UUMA Executive Committee, David Sammons, January 2001
- Mountain Desert District Board, Makaanah Morriss, February 2001
- Dallas, Texas Area Ministers, Task Force, February 2001
- DRUUMM, John Weston, February 2001
- YRUU Steering Committee, Denny Davidoff, February 2001
- UUA Presidents' Council, Wayne Clark and Kay Montgomery, March 2001
- UUA Board of Trustees, Wayne Clark, Denny Davidoff, Kay Montgomery, April 2001

Interviews

- Rebecca Parker, President, Starr King School for the Ministry, David Sammons, January 2001
- Jim Austin, Director of Information Technology Services, John Weston and Kay Montgomery, January 2001
- John Buehrens, Wayne Clark, January 2001
- Pete Rogers, Human Resources Director, John Weston and Kay Montgomery, January 2001
- Bill Sinkford, Candidate for President, Roger Comstock, February 2001
Heather Saunders-Estes, President, Planned Parenthood Shasta Diablo, David Sammons, February 2001
- Patsy Madden and Diane Olson, Candidates for Moderator, David Sammons, February 2001
- Pat Ellenwood, LREDA President, Makanah Morriss, February 2001
- Lena Breen and Judith Frediani, Religious Education Department, Makanah Morriss and John Weston, March 2001
- Meg Riley, Washington Office, Denny Davidoff and Kay Montgomery, March 2001
- Diane Miller, Candidate for President, John Weston, March 2001
- Bill Murry, President, Meadville/Lombard Theological School, John Weston and Makanah Morriss, March 2001
- The Rev. Douglass Lind, Presbyterian Minister and Consultant, Kay Montgomery, March 2001
- Susan Archer, Metro New York District Program Consultant, Makanah Morriss, March 2001

Reports and Other Communications

- Message from the Mountain, Helen Bishop, November 2001.
- Report from the Southeast District Executive Experiment, Roger Comstock, November 2001.
- Report of LREDA Board to “To Be Of Use,” December 2000.
- Letter from Bill Murry, President of Meadville/Lombard Theological School to David Sammons, January 2001.
- Summary of UUA-CUC Negotiation Meeting, Denny Davidoff, January 2000.
- Survey of All Remote Staff, Wayne Clark and Roger Comstock, January 2001.
- Summary of Focus Group Responses, David Sammons, February 2001.
- Report on Leadership Training Stakeholders Meeting, Roger Comstock, February 2001.
- Reflection on the Task Force on Structure and Services from the Small Church Ministers’ List, William Feinberg and Frances Manly, February 2001.
- “UUA Offices in Washington, Future Direction,” Meg Riley, March 2001.
- Summary of Remote Staff Questionnaire Responses, March 2001.
- “Ideas About UUA Organization,” Roger Comstock March 2001.

- “Response to the Tentative Recommendations from the Task Force on Structure and Services,” Lawrence Palmieri Peers, March 2001.
- A Proposal to the UUA Board by The Mountain Center for Learning, April 2001.

Comments from People Asked to Write About the Value of 25 Beacon Street

- Roger Fritz
- Carolyn Lavender
- Peter Raible
- Ken Sawyer
- Bill Schulz
- Art Ungar

Individual Comments on the Work of the Task Force

- Pam Bachman
- Wendy Baruch
- Margaret Beard
- Paul Beedle
- Paul Bickel
- Richard Boeke
- Marjorie Bowens-Wheatley
- Robert Bradway
- Walt Courtley
- Bea deMuinck Keizer
- Robette Dias
- Donna DiSciullo
- Mark Gallagher
- Garry and Carol Green
- Anne Heller
- Carolyn Henry
- Leslie Heyboer
- Greg Hunt
- Kurt and Carol Jensen
- Vic King
- Carolyn Lavender
- Daniel Simer O'Connell
- Mel Harkrader Pine
- Dwight Politte
- Barbara Prairie
- Margaret Sanders
- Adam Stuhlfaut
- Aimee Tattersall

- Al Thelander
- Audrey Vincent
- Sarah Voss
- Alice Blair Wesley

APPENDIX C: PRINCIPLES FOR OFF-SITE WORK FORCES

Materials Reviewed

- Alvarez, Mark. *The Home Office Book: How to Set Up and Use an Efficient Personal Workspace in the Computer Age*. Woodbury, CT: Goodwind Press, 1990.
- Armstrong, D. J. and P. Cole. "Managing Distances and Differences in Geographically Distributed Work Groups. In *Diversity in Work Teams: Research Paradigms for a Changing Workplace*, edited by S. E. Jackson and M. N. Ruderman. Washington, D.C.: American Psychological Association, 1995.
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- Bredin, Alice. *The Virtual Office Survival Handbook: What Telecommuters and Entrepreneurs Need to Succeed in Today's Non Traditional Workplace*. New York: John Wiley, 1996.
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- Jude-York, Deborah, Lauren D. Davis, and Susan L. Wise. *Virtual Teaming: Breaking the Boundaries of Time and Place*. Menlo Park, CA: Crisp Publications, Inc., 2000.
- Kostner, Jaclyn. *Virtual Leadership: Secrets From the Round Table for the Multi-Site Manager*. New York: Warner Books, 1994.
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Key Principles For Off-Site Work Forces

- A high level of trust must be developed and maintained.
- Begin with a demonstration project of one year in length.
- Off-site workers must be chosen carefully, using clearly defined criteria.
- Individual written contracts must be created for each situation (defining roles, responsibilities, ownership and security issues).
- Volunteers only! No employees should ever be forced to become an off-site worker.
- Management model must become one of guiding and coaching (as opposed to supervising).
- Human resources policies and support must be adapted.
- Proper working environments must be developed in each off-site location.
- Appropriate technological and telecommunications support must be provided.
- Jointly developed performance-oriented evaluation procedures are important.
- A production-oriented method of evaluation needs to be created for each specific situation.
- On-going training must be provided for off-site workers, centrally located co-workers, and even the families of off-site workers.
- A system of frequent feedback must be designed and implemented.
- A consistent schedule of communication (both formal and informal), including periodic in-person contact, must be developed.
- There must be a willingness to adapt, based upon evaluations and feedback.

[From a review of the literature by Wayne B. Clark, September 2000]

Benefits of An Off-Site Work Force

For the organization

- Lowered cost of real estate (better space utilization)
- Reduced office space requirements
- Decreased employee sickness
- Decreased health care costs
- Increased safety (homes are safer than cars)
- Wider pool of highly qualified employee candidates; not geographically dependent
- Reduced rate of employee turnover
- Increased access for the mobility handicapped employees
- Ability to keep valued employees
- Increased productivity (10% to 50%)
- Better management process (coaching and guiding model)
- Reduced air pollution from less travel
- Opportunity to spend more in-person time with local constituents (if using a satellite model)

For the individual employee

- Improved employee quality of life
- Fresh start each day
- Increased employee morale
- Reduced employee stress
- Increased family time
- More flexible child care options
- More flexible elder care options
- More flexible scheduling of personal chores (under planned and authorized circumstances)
- Greater participation in local civic activities
- Increased employee freedom, autonomy and control over work conditions (furnishings + environment)
- More employee schedule flexibility (start time, break time, end time)
- End of office disruptions and distractions
- Elimination of unplanned and unproductive meetings
- Increased quality of communications with peers and supervisors
- Fewer phone interruptions
- Expansion of the geographic opportunity base
- Reduced clothing costs
- Reduced (or eliminated) transportation costs
- Reduced (or eliminated) commuting time
- Privacy of working at home

[From a review of the literature by Wayne B. Clark, September, 2000]

Barriers to An Off-Site Work Force

For the organization

- Loss of control
- Greater need for coordination
- Decreased flexibility for the unplanned
- Requires new culture of management
- Managers may resent loss of central office space and accompanying status
- Cost of training (for managers, remote workers, and remaining central office workers)
- Requires dramatically different human resource policies and support
- Employee abuse
- Difficult to supervise = potential loss of productivity
- Increased employee turnover (people not adaptable to remote work)
- Potential loss of organizational loyalty
- Cost of virtual office equipment, technology and office furnishings
- Ownership issues (furniture, equipment, data)
- Security issues
- Technological and mechanical problems
- Commitment to 24/7 information technology support

For the employee

- Loss of traditional office perquisites (office culture/socialization, spontaneous communication)
- Limited home office space
- Distracting family/home environment
- Loss of person-to-person contact with colleagues = feelings of isolation, neglect and invisibility
- Access to hard files and materials
- High level of employee self-discipline required
- Difficulty in separating personal life from professional life
- Workaholism
- Loss of access to central office services (copiers, fax, mail services)
- Timeliness of snail mail
- Employees move off the organizational grapevine
- Employee organization socialization skills may not get developed (especially among young workers)

[From a review of the literature by Wayne B. Clark, September 2000]