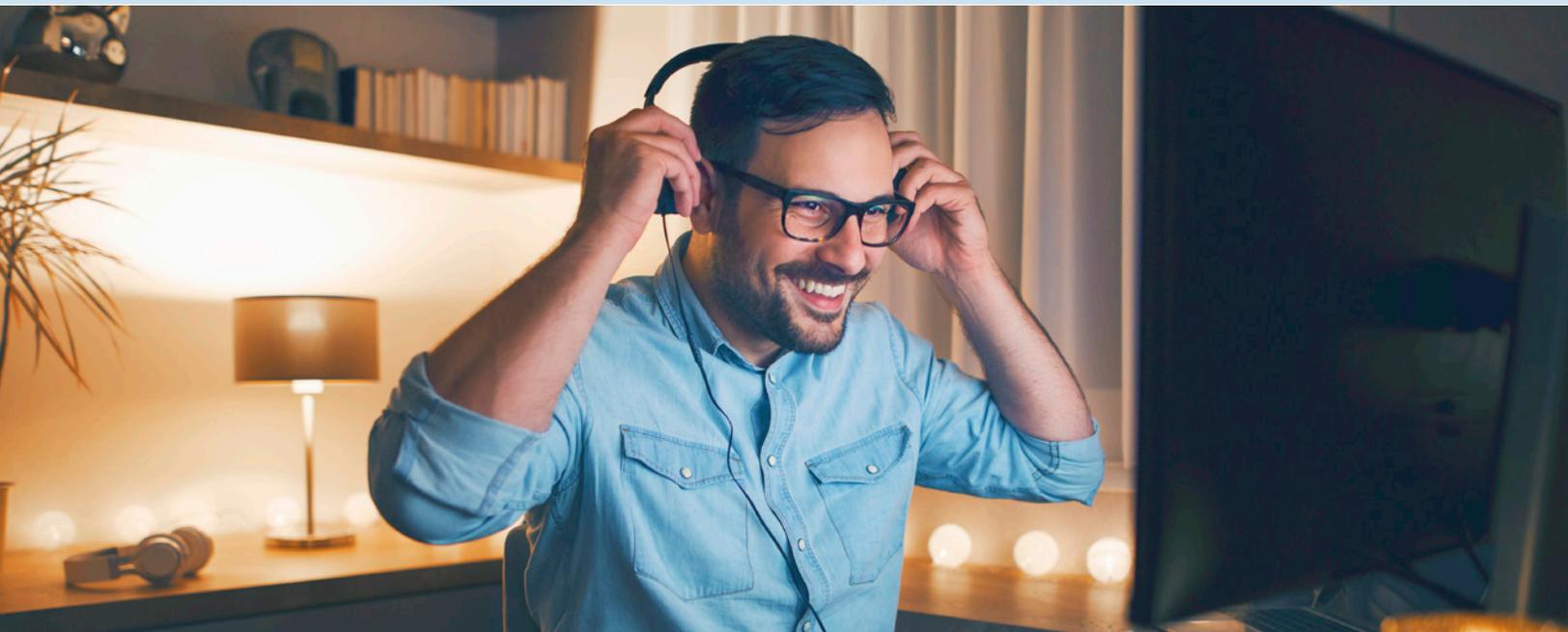


A COMPLIMENTARY GUIDE TO EFFECTIVELY  
MANAGE AND SUPPORT REMOTE WORKERS





## WELCOME TO THE REMOTE WORK TOOLKIT

This **Remote Work Toolkit** is a reference manual that provides guideline considerations to effectively manage and support remote workers.



These guideline considerations are intended to provide assistance to employers who may be transitioning employees to remote work for the first time or have recently done so. While the toolkit includes some typical policy language noted below, it is advised that every company should adjust their policies, procedures and protocols to fit their specific business needs.

The toolkit is organized into five aspects of remote work:

1. Guidelines
2. The Workspace
3. Remote Worker Compliance, Technology and Information Security
4. Leadership and Employee Engagement
5. Mental Health and Wellness

### REMOTE WORK TOOLKIT INTENDED AUDIENCE

This toolkit was designed for employers and managers of remote staff.

### OVERVIEW OF REMOTE WORK

Remote work arrangements can offer many benefits for the company, including:

- Greater flexibility and opportunity to accommodate employee work arrangement needs
- Improved use of real estate and space,
- Increase in employee productivity,
- Access to a larger pool of skills and knowledge (companies can recruit and hire the best people regardless of their physical location),
- Improved employee engagement, and
- Rapid recovery after a significant business disruption or natural disaster.

Employees benefit as well, with advantages such as:

- Less or no commuting,
- Better balance between personal and professional lives, and
- Flexible opportunity to relocate or live in desirable locations.

Remote work can be an important strategic initiative that helps the company to diversify methods to conduct and support business. Remote work is a business model which enables the company to attract and retain critical talent, provides an environment responsive to business flexibility and resiliency, manages expenses, relieves office and parking space constraints, and makes the company a more desirable place to work.

## 1. | GUIDELINES



Regardless of work location, all employees should remain subject to and expected to comply with your company’s various policies and procedures.

### Managing Employee Performance

The ability to maintain high levels of performance is a pre-requisite to any successful remote work program. Regardless of work schedule or location, establishing performance goals and expectations is paramount. Managers should continue to specify objectives, deliverables, measurement standards and time frames for performing individual job duties. The employee should continue to experience a normal cadence for reviews and performance evaluations.

Employers should consider formalizing remote work standards by creating a Remote Work Statement of Expectations. Documenting expectations provides

structure and accountability to ensure all company policies will continue to apply in a remote setting. The Remote Work Statement of Expectations can be signed by both the employee and their manager at the company’s discretion. Whatever decision is made be certain a standardized approach is implemented throughout the company.

### Employee Success

The most successful remote worker possess many, if not all, of the following skills and attributes:

- Self-motivation and discipline to work during expected working hours
- Ability to communicate effectively (written and verbal)
- Time management and ability to meet deadlines
- Basic understanding of technology
- Ability to adapt and learn new processes

Employee coaching and training will be critical for the individual to succeed and be a productive remote worker. Online resources and/or webinars can be offered to support employees who need additional support to gain these core skills.

### Communication Tips

Strong communication is essential to a successful remote work program. A variety of communication methods should be contemplated to determine which is appropriate, courteous and effective in a remote setting. When preparing to communicate with co-workers consider the following:

WHAT IS THE PURPOSE OF MY COMMUNICATION?	COMMUNICATION TECHNIQUE
Provide a brief status update	Email
Ask a simple question	Instant message or text message (via employer approved device)
Project or business discussions	Virtual meeting or conference call
Business updates	Email with a written attachment or attached newsletter
Asking a complex question or asking for guidance which requires lengthy back and forth discussion	Phone call or virtual meeting
Connect briefly with staff as a “check-in”	Instant message or text message (via employer approved device)

## Guidelines for Written Communication



- What information does the audience need to know? (Purpose of the communication)
- Who is the audience that needs to receive the communications?
- Who is responsible to communicate the information to the audience?
- How will the information be communicated?
- Frequency. Will follow up communications be required? Is a timeline appropriate?
- Is it necessary to store or memorialize the communication? If so, what medium?

## Time Off, Absences and Hourly Employee Considerations

Defining processes and criteria for how and when remote employees should use available time off can be a challenge.

It is vital that clear guidelines and policies are communicated effectively to your remote workforce. A company policy should address what actions are taken if a technical issue prevents the remote worker from performing their job duties. This is particularly important for hourly employees. The cause of a technical disruption should be identified to determine if it is a result of company equipment or the employee's internet service provider.

IF YOUR COMPANY...	THEN YOU SHOULD...
Offers paid time off (PTO), vacation time, or sick leave benefits to employees	<p>Develop a policy and communication plan for your remote workers that address the following:</p> <ul style="list-style-type: none"> <li>• Procedure for how and when to request time off of work</li> <li>• When to utilize leave for illness</li> <li>• Approval process of any leave request</li> </ul>
Relies on accurate tracking of employee presence and availability	Develop a written plan to address standard work hours based on the employee's role and business needs.
Employs hourly remote workers	<p>Implement a way to accurately track your employee's work hours to remain in compliance with federal wage laws.</p> <ul style="list-style-type: none"> <li>• The federal Fair Labor Standards Act (FLSA) requires employers to pay employees for all hours actually worked. There are multiple time-tracker programs available that can also monitor employee productivity.</li> <li>• Inform your employees if overtime requires prior manager approval.</li> <li>• Ensure that your hourly employees are paid overtime in accordance with FLSA and other applicable laws.</li> <li>• Contact the Department of Labor with any questions regarding compensation for your employees.</li> </ul>

## 2. | THE WORKSPACE

### Setting Up a Remote Workspace



The remote worker's home office setup significantly affects effectiveness, productivity and overall success. Comfort, safety and efficiency will all be affected by how a remote workstation is arranged.

Furniture, technology, equipment and supplies for the remote worker setup should be considered.

### Equipment

Depending on the employee's role and responsibilities, office equipment typically includes a phone, headset, laptop, tablet or desktop, associated keyboard and mouse, one or more computer monitors, a router, copy/fax machine, printer/scanner and shredder.

As necessary, the same standard office supplies available to an on-site employee should be provided to a remote worker (e.g., pens, paper, stapler/staples, file folders, printer toner, cartridges, etc.).



### Furniture

A proper workstation configuration is necessary not only to ensure productivity but also to avoid ergonomic-related injuries. Physical conditions such as carpal tunnel and lower back pain can result from improper setups. Things to consider if employees order furniture:

- Designated workspace measurements

- Ergonomic features – the more adjustable features the better (i.e., height and armrest adjustments on a chair, keyboard tray, etc.)
- Assembly – tools and time required
- Necessary assistance to deliver and set up furniture

### Business Mail

Although more and more communication is done via email and electronic messaging, hard copy paper and wet signatures are still sometimes required. Where necessary, consider how business mail will reach the remote worker, particularly if originating from a business customer, vendor or other third party. Although direct mailings to the employee's home address may be suitable in some instances, the use of a local P.O. Box, or direction to a single business location with batch mailing to the employee may also be appropriate.

### Remote Office Safety Considerations

#### General Safety

Adoption of the following practices can help to ensure the general safety of remote employees:

1. Secure all loose cords and ensure stairs, hallways and walkways are clear to prevent tripping.
2. Close drawers after use.
3. Never use chairs, especially rolling swivel chairs, as ladders for reaching overhead items.
4. Practice appropriate lifting techniques, taking into consideration the weight of the object, the ability to maintain a good grip, the height of the lift and the distance/path the object is to be carried. In general, center yourself over the load, bend your knees, keep the load close to your body between mid-thigh and mid-chest height, avoid twisting (turn with your feet) and, when possible, divide a heavy load into several smaller ones.
5. Never carry anything that obscures your vision.
6. Install a carbon monoxide detector. Follow the package directions for proper placement and use of the alarm.
7. If small children, babies, or pets are in the home, childproof the office.
8. Keep equipment away from water sources.

## Fire Safety

1. Do not overload electrical circuits and avoid the use of extension cords. Use a surge protector for all equipment.
2. Have a multi-purpose fire extinguisher within easy access.
3. Avoid keeping hot plates or coffee pots within the office area.
4. Don't get distracted by doing multiple tasks that involve fire risks (i.e., cooking in the kitchen while working).
5. Avoid using space heaters for warmth in your home office as the heat generated by these appliances can create fire and safety hazards and are responsible for many fires per year.
6. Make sure that the office setup does not hinder escape routes (i.e., a large cabinet in front of the windows).
7. Ensure smoke and carbon monoxide detectors are working properly.

## Other Environmental Considerations

There are additional factors that can help minimize distractions and provide a better working environment. Remote workers should consider:

### Heating/Cooling

Consider the temperature of the workspace. A workspace in a finished basement may seem ideal in the heat of summer but may be too cool in the winter.

### Ventilation and Lighting

Windows facing east or north give the best light throughout the day, without too much glare or direct sunlight. In any case, be sure to position your computer monitor perpendicular (at a right angle) to any windows to avoid glare on the screen and reduce eye fatigue and strain. Also consider airflow in the workspace. A confined corner may become stuffy and prevent effective work.

### Household Distractions

Keep the office space away from main traffic areas of the household. The kitchen, front door and family room may be areas where distractions will hinder work, and these common areas should be avoided as a designated workspace whenever possible. This is especially important if there are children and/or pets in the house during the day.



## Workspace Organization

A properly stocked and organized workspace will promote efficiency, reduce distraction and make for a more enjoyable remote work setting. A few key things to keep in mind:

1. The desk should have sufficient space to store all necessary supplies.
2. The employee should be aware of frequently used materials (i.e., notepad, pen, stapler, file folders, etc.) and ensure these items are easily accessible on the desk.
3. Non-essential supplies should be moved out of the field of vision. Piles of supplies, extra rolls of tape and high stacks of paper are distracting and should be avoided.
4. A desk organizer is a cost-effective way of arranging frequently used supplies while also keeping them within reach.
5. A bookshelf, cabinet, or other shelving unit should be used to store non-confidential materials such as binders, manuals and excess supplies to free the desk of clutter.

### 3. | REMOTE WORKER COMPLIANCE, TECHNOLOGY AND INFORMATION SECURITY



Data security and privacy are critical to the success of any business. Consider maintaining a company policy that addresses the following topics that can present unique challenges in a remote work setting:

1. Securing the workspace. All remote workers should secure their work in a manner that prevents access by family members and anyone else other than authorized company employees.
2. Network security standards.
3. Portable devices - Assure all portable devices, company or personally owned, are password-protected and encrypted.
4. Cybersecurity software/Multi-factor authentication guidance.

#### Technology

Specific business initiatives and job roles will dictate how to best equip the remote worker and other members of the team who work with remote workers.

Internet requirements for remote employees can be established based on the individual's role and responsibilities, in addition to business needs.

#### Use of Collaboration Tools

Collaborative software is software designed to help people who are involved in a common task achieve their goals. Collaborative software is the basis for computer-supported cooperative work. Software systems such as email, calendaring, text chat, video conferencing, etc., belong in this category.

Instant messaging supports conversational interaction. It is also effective in helping the employee feel instantly connected and a very useful tool to identify when all employees are available. The use of video conferencing can create a deeper interaction between remote employees, which can improve collaboration.

#### Technical Support

Technical issues are bound to occur, and may be even more prevalent with newly deployed remote workers. Create a procedure for remote workers when they require technical support that addresses the following:

1. Who do they contact?
2. What is the method of contact?  
(Phone, email, instant message, etc.)
3. When is technical support available?

### 4. | LEADERSHIP AND EMPLOYEE ENGAGEMENT



Leadership and employee engagement is difficult regardless of the work environment. Leading and keeping remote employees involved is critical for business success. Consider taking time to read, listen to podcasts or watch educational or motivational videos about the following topics: team building, recognition and rewards, helping employees adjust to working remotely and leading through change. Ways to engage with teammates and managers can include virtual coffee breaks and scheduling regular one-on-one video meetings. To keep things light and upbeat take a break and try some virtual team-building activities.



### Three Types of Remote Work

The three types of remote worker are identified below. Contemplate how employee engagement may differ between fully remote employees, partially remote employees and a blended team of remote and on-site employees.

Full-Time Remote	Employee conducts work at a non-company location 4-5 days/week
Part-Time Remote	Employee conducts work at a non-company location 1-3 days/week
Occasional/Ad-hoc Remote	Employee conducts work at a non-company location on an unscheduled, as needed basis

#### Full-Time Remote

On-site and partially remote employees will naturally have more opportunities to socially interact with their peers and may not require as much structured engagement. Full-time remote workers will benefit from regularly scheduled team huddles via video/voice chat to collaborate and engage with their manager and teammates. Allow employees to engage with all levels of leadership. Skip-level meetings (an employee meeting with their manager's manager) can be scheduled at a regular cadence, such as quarterly. These meetings allow the remote worker to maintain a working relationship with management to discuss a variety of topics, to include, but not limited to: career advancement opportunities, insights into company initiatives and professional networking.

#### Part-Time Remote

When an employee splits their time between the office and their remote workspace, leaders should schedule one-on-one meetings for when the employee is on-site. Regular informal check-ins should also take place while the employee is working remotely to ensure the employee feels involved and has access to support and resources.

### Occasional/Ad-hoc Remote or Blended Teams

If a manager has a blended team of in-office and remote employees, the manager should choose a consistent method of communicating with all workers. For example, a manager may request that in-office employees join a conference call from their respective workstations as opposed to a conference room, as the remote worker is unable to physically join the team on-site. This prevents a sense of disconnect for the remote worker during team gatherings. Whenever possible, the manager should schedule on-site meetings that accommodate the occasional remote worker's schedule to create a sense of inclusivity.

## 5. | MENTAL HEALTH AND WELLNESS

Working remotely is a significant lifestyle change that can come with additional complexities. It is important



to keep the employee's health and well-being top of mind. For employees who recently transitioned to remote work, be mindful of the challenges this may pose as they integrate new demands at home.

#### Work/Life Balance Strategies

There are undoubtedly challenges to remote working. Balancing work responsibilities (along with caring for children, parents, or other family members) can be difficult. Communication between the employee and their manager should take place to discuss how the employee may care for themselves and family, while simultaneously fulfilling their work responsibilities. Working from home can make it more difficult for the employee to separate work from personal time. This can lead to stress or burnout. To provide support, consider the following:

1. Can work hours and breaks be structured to avoid burnout?
2. What boundaries can be set?
3. Is it possible for the remote employee to flex their schedule to tend to other responsibilities (i.e., caring for children or other family members) during standard business hours?

## Get Away from the Computer

An office environment provides employees with opportunities to frequently leave their desk as they interact with co-workers, visit the break room, or attend in-person meetings. Remote employees can find themselves in front of their computer for hours on end, as their work-related interactions are dependent on the technology. The American Psychological Association (APA) notes that exposure to nature (urban parks and trees included) has been linked to improved attention, lower stress and a better mood.

## Healthy Eating

Eating healthy while working from home can be a new challenge for many. Remote employees have easy access to food and beverages at all times during the day, which can lead to overeating or unhealthy choices. Employers can encourage and support their employees to create a meal schedule that fits their needs and keeps them hydrated.

## Schedule Time for Exercise

Exercise can help improve focus and energy levels. Just as on-site employees may walk with peers during a break, remote employees should be encouraged to schedule time for exercise. As noted above, getting away from the computer for a short walk outside can have numerous benefits. If remote employees have an approved flexible schedule, a visit to the local gym or fitness center during the workday may be approved. Employees can also find a variety of exercise ideas online or via apps to perform at home without equipment. Advise employees to find an exercise program that fits their individual needs, consulting with their physician as needed.



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