

Telework Policy How to Guide



TELEWORK POLICY HOW TO GUIDE

With telework gaining momentum as a business strategy to continue operations during and after a pandemic, many organizations are looking to adopt telework to mitigate potential disruptions to productivity in the workplace. In the simplest form, telework allows employees to conduct work away from the office. The implementation of a telework program must align with the organization's mission and support overarching goals for day-to-day business operations. Developing a telework policy is an effective way to document guidelines and expectations for communication, eligibility, and use of equipment, among many other programmatic elements.

In this document, you will find suggestions and samples provided by Club Ride to assist you in creating a sustainable telework policy for your organization. Telework policies are custom to each organization; this guide will help you conduct a comprehensive analysis of your existing policy or assist you in developing a policy that is built to fit your organizational needs. By providing this document, Club Ride is not providing legal or financial advice. Consult your legal and human resources teams whenever implementing a new policy. This guide contains summaries and examples for many policy considerations.

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PURPOSE

Here you will summarize the telework program and policies for your organization and outline the purpose of the telework policy and why it is being offered. This section can come in the form of a mission/vision statement.

- **Example:** With the intent of reducing our carbon footprint and providing a new way of commuting, ABC Company provides a telework option for eligible employees. This policy sets the administrative guidelines for the telework program, which aims to achieve commute trip reduction goals, sustain hiring and retention of the workforce, and increase productivity.
- **Example:** The purpose of ABC Company's policy is to provide employees with a telework option during the COVID-19 shutdown. The intent of the telework program will be to establish social distancing while still being able to support the continuity of operations.

DEFINITIONS

In this section, you are providing a description of what telework is and is not. An organization can make this as broad or as specific as necessary, and the description is dependent on your situation. An organization creating a sustainable telework program may want to keep their description broad. If an organization is creating a telework program to implement only in emergency situations, a narrower definition may be desired.

- **Example:** Telework is an alternative work arrangement in which an employee can work from outside their traditional work location. The employee will normally work from their home or another location. This is not to be considered an official universal benefit, but a business strategy provided by ABC Company on a case-by-case basis.
- **Example:** Telework is working from home or another location on a full-time or part-time basis. Telework is a continuation of ABC Company's services. Telework is not a substitute for childcare and is not a full universal benefit.

SCOPE

A telework policy should also contain a statement about the reasons for implementation. In a sustainable telework program, an organization should keep the scope broad to include environmental reasons, work/life balance, continuation of services, or emergency situations. This also outlines which policies supersede the telework program and policies.

- **Example:** Telework arrangements may be made in order to extend customer service hours outside the typical worksite hours. Telework can be implemented on a full-time or part-time basis. For more information on how to use telework along with short-term disability leave, please contact your HR representative.
- **Example:** Telework arrangements may be made in order to reach environmental goals. Telework is available for those who work full-time and part-time. The overtime policy will remain the same for employees working at the worksite or via telework.

ELIGIBILITY

This section will outline which employees are able to request participation in the telework program. Eligibility requirements could be based on employee status (full-time/part-time), tenure (employed for at least six months), position (Customer Service/IT/Account Manager), or performance and behavioral traits (self-motivated/high performance). An organization can also include a clause to empower managers to override eligibility requirements.

- **Example:** An employee must be employed by ABC Company for at least three months before eligible to participate.
- **Example:** The telework program is available for full-time employees with limited in-person interactions required to conduct their job functions.
- **Example:** An employee's direct manager or supervisor determines an employee's eligibility for the telework program. Eligibility for the telework program will be based on previous job performance, ability to work independently and other traits.

APPLICATIONS AND APPROVALS

For documentation purposes, an application via paper or a digital form can assist employees in evaluating if they are eligible for telework. The application should lead to a conversation between managers and employees to assess if telework is the right fit. Once the arrangement for telework is agreed upon by all interested parties (could also include human resource approval), the approval should be documented for future reference. The application could be adopted as the formal agreement or a separate agreement could be completed and signed.

- **Example:** To participate in telework, the employee must submit a request to their direct manager and complete a Telework Agreement form.
- **Example:** Employees must attend training on telework and meet with their manager to outline expectations.
- **Example:** Employees must consult with the IT department for an assessment of telework equipment.
- **Example:** After a 30-day teleworking trial period, the manager will evaluate the telework arrangement.

TELEWORK AGREEMENT

While a telework policy outlines a company's broad responsibilities, a Telework Agreement is much more detailed and specific to the individual employee. The Telework Agreement is a separate document signed by the employee and their manager. It may include job functions to be performed while teleworking, defined work hours and performance expectations. This Agreement is usually a company-wide template.

- **Example:** Refer to the Club Ride Agreement Form example.

MANAGER RESPONSIBILITIES

Recommendations or requirements for managers can be found within the telework policy. These can include management style variations, trainings on managing teleworkers, and trainings on the telework policy.

- **Example:** Maintain documentation relevant to the employee's performance while teleworking.
- **Example:** Increase lines of communication with employee, including daily/weekly follow-up meetings.
- **Example:** Assign role-relevant tasks with an emphasis on deliverables.

EMPLOYEE RESPONSIBILITIES

Employee responsibilities are determined by the job description and role but added responsibilities may be necessary while teleworking. The telework policy should offer general guidelines for employees, while a Telework Agreement is more specific to the individual employee.

- **Example:** Employee must attend telework training prior to beginning telework.
- **Example:** Employees who are teleworking must attend weekly scheduled meetings with their manager.
- **Example:** Teleworking employees must complete a weekly productivity report.

TRAINING

Telework policy may include a list of trainings for employees and/or managers to complete before establishing a telework routine.

- **Example:** Telework employees must complete a telework and productivity course.
- **Example:** All telework employees must submit their certificate of completion for telework training from the Learning Management System to their direct supervisor.

DURATION

Telework policies can also contain specifics on duration. Sustainable telework policies will note that workers may telework indefinitely, but other arrangements may require a specific time period.

- **Example:** Any Telework Agreement will be on a trial basis during the first 60 days. Managers may alter or withdraw the Telework Agreement at any time.
- **Example:** Telework Agreements will be reviewed at least once per year with the option for an extension and/or renewal.

COMMUNICATIONS

Communication is an integral part of a productive workforce and is usually addressed in the telework policy. The telework policy will usually address communications between employees and their managers, clients, and colleagues. With the advances of technology, communication takes place across multiple platforms (i.e., videoconference, Teams, Jabber, WebEx). Communication channels and protocols should be established in this part of the telework policy.

- **Example:** Teleworking employees will communicate via phone, email, inter-office chat software, and videoconferencing tools. Managers will establish which tools to use in each instance and the frequency of communication.
- **Example:** Teleworkers must be accessible during agreed-upon hours. Employees must return phone calls and emails within 24 hours. Online calendars must be kept up-to-date and must note times when the employee is unavailable. When communicating with a client, an employee must behave in the same professional manner as if they were in the office.

SCHEDULES

Telework policy must also address an employee's working hours and schedule. The clause should empower the manager to change these if necessary. In some office settings, hours are normally set and cannot be changed. Or, organizations may institute core hours allowing for flexible arrivals and departures from the workplace. Your company should specify how work hours will be observed company-wide or at the directive of department heads or managers.

- **Example:** ABC Company has a strict schedule for working hours and teleworkers must abide by these times. This includes answering emails and phone calls and attending meetings. Any changes in work hours, including overtime and leave, must be approved in advance by a supervisor.
- **Example:** Telework employees must complete their specific number of work hours weekly. Work hours are to be established by their supervisor. Employees have the flexibility to determine their own schedule provided the number of hours worked is met.
- **Example:** Employees must post their schedule daily and record tasks completed within each hour.

WORKSPACE

To reduce safety concerns and liability for telework, designated workspaces and safety practices should be detailed within the telework policy. The level of complexity in the policy will be dependent on the employee's role and the type of information being handled. In this section, your organization will need to address remote safety, equipment installation, ergonomics, setups, and other items. Consult your health and safety professionals and conduct a legal review of the policy parameters. A sustainable telework policy maintains the balance of addressing many scenarios, while also allowing for flexibility for unexpected changes.

- **Example:** Teleworking employees must have a designated workspace that is free of debris, safe, and ergonomically sound to complete their tasks. ABC Company will not provide teleworking employees with furniture.
- **Example:** Work materials should be maintained within the designated workspace. It is the employee's responsibility to maintain the security of the information provided to them.

EQUIPMENT

A telework policy should identify what and how company-provided equipment can be used to support telework. Employees may be issued specific types of equipment by IT (such as headphones and laptops), or an employee may use personal devices. Companies may offer a monthly allowance for personal mobile phone use or offer employees a stipend to purchase their own equipment from an approved list to avoid the need for an equipment check out. This section of the policy should be written and/or reviewed by the IT department. Another consideration within this section would be the handling of potentially sensitive data.

- **Example:** Employees are to report to the IT department to check out telework-specific equipment.
- **Example:** ABC Company provides teleworkers with an annual \$200 stipend for equipment and office supplies. Employees are required to file for the \$200 telework stipend based on the approved item list in order to obtain specific equipment.

PERFORMANCE STANDARDS AND PERFORMANCE EVALUATION

Multiple surveys of teleworkers and managers show that employees are as productive or more productive when working from home. This section of the telework policy outlines the standards in productivity and professionalism employees should maintain when working from home. Level of monitoring for an employee may differ while teleworking. An organization may add a clause that states that employee evaluations are not dependent on their telework status. It is encouraged for managers and employees to set performance evaluation guidelines prior to the start of teleworking

- **Example:** Managers and employees are to agree on work standards during teleworking and maintain those standards throughout the teleworking period.
- **Example:** It is expected that employees and managers will not abuse the telework program by allowing their productivity or quality of work to decline. Work output must meet or exceed what is typical at the worksite.
- **Example:** Productivity and performance evaluations will not be affected by an employee's telework status. Employee benefits, compensation, and insurance will remain the same regardless of telework status.

REVIEWS AND EVALUATIONS

The telework policy should outline the review and evaluation of both the employee and the telework program. Organizations may opt for a clause outlining the review and evaluation process for the telework program. This could include surveys, focus groups, and potential timelines for policy updates. The evaluation may also include individual employee reviews and evaluation criteria in the telework program.

- **Example:** A teleworker must take part in all ABC Company telework program evaluations.
- **Example:** A teleworker will complete a quarterly evaluation on the effectiveness of the telework program.

SOFTWARE AND SECURITY

There are many considerations when selecting software to be used while teleworking. For the purposes of the telework policy, an organization may want to outline which types of software is allowed and how they should be used. Along with the choice in software, security is an increasing concern in the digital space. It may be necessary to note digital trainings and courses required.

- **Example:** ABC Company provides access to the network using a mandatory VPN program. Employees are responsible for maintaining the safety and integrity of ABC Company's digital data. This includes being on the lookout for viruses and malicious intent.
- **Example:** Employees will use a Zoom teleconferencing tool to communicate externally and leverage the chat within Microsoft Teams software to maintain daily contact with coworkers.

LEGAL/LIABILITY /ADA

A telework policy should also include a section for legal and liability concerns. A legal/liability department and an accessibility manager may examine the telework policy. A sustainable policy may include language that protects both the employee and the organization.

MODIFICATION OR TERMINATION

Sustainable telework policies include a clause that lends flexibility to the program. It is common for an organization or manager to hold the right to change, modify, or terminate a telework program or a Telework Agreement.

- **Example:** A telework employee may terminate the Telework Agreement with a 30-day notification. The employee and manager can make amendments to the Agreement.
- **Example:** ABC Company can change, modify, or terminate the Telework Agreement. Employees will be provided with a written notification of these changes.

SOURCES

<http://www.teleworktoolkit.com/library/PolicyWritingGuide.pdf>

<https://corporate.delltechnologies.com/content/dam/delltechnologies/assets/who-we-are/resources/dell-technologies-flexible-work-policy.pdf>

<https://policies.uni.edu/426>

<https://adminfinance.umw.edu/hr/files/2020/03/Telework-Agreement-Fillable-2019-08-02.pdf>

CONTACT US

Club Ride is available to all Clark County employers. For free consultations and guidance on teleworking and other green commute modes, please contact us at:



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