Telework / Hybrid Work Toolkit

MANAGEMENT SECTION

The decision to allow an employee to become a hybrid worker is typically made at the management level, and eligibility is based on a number of factors for the position and the employee. The criteria used should be contained in the organization's written hybrid work/telework policy and applied uniformly. Overall, eligibility should be based on the determination that the duties and responsibilities can be performed at an alternative location without negatively affecting employee performance or organizational operations. General factors to consider include:

Position factors

- Conduciveness – Start by evaluating each position to determine what tasks or job functions can be performed remotely. Good indicators are that the work can be performed independently, the need for face-to-face interaction is minimal or can be replaced by other means (phone, email, or video), access to needed documents and files can be accomplished remotely, and the quantity and quality of performance are easily evaluated.

  When assessing position eligibility, managers should also consider how often the work can be performed remotely. It can be helpful to evaluate positions by using different categories, such as 100% Office (work can only be performed in the office), Hybrid (a combination of working at home and in the office), or 100% Remote (all work can be performed remotely). Actual frequency needs to be balanced with staffing levels required to maintain the organization's business needs and to provide adequate office coverage.

- Restrictions – Not all jobs can be done remotely. A 2020 study conducted by the Washington State Department of Environmental & Occupational Health Sciences at the University of Washington found that upwards of 75% of jobs are challenging to do from home. The metrics used in the study included the **importance of using a computer in the job** and the **importance of interacting with the public**. Workers whose jobs require a high level of interaction with the public and that do not involve the use of a computer are not likely to be able to work remotely. These are typically people employed in retail, health care, manufacturing, food services, hospitality, personal care services, and transportation providers.

- Measurable Deliverables – Employee achievements should be specific, measurable, and have realistic timeframes for completion. Examples include completing a report, preparing a budget, reviewing/editing a document, preparing a presentation, processing payments, or any other output that shows progress toward completing a specific goal or task. Incorporating measurable deliverables into the hybrid work environment makes employee performance evaluations easier and more transparent.

Performance factors

After determining the position's eligibility, the next step is to determine if the employee is a good candidate for working remotely. Factors to consider include:

- Dependable. Does the employee have a demonstrated history of being present, abiding by organizational rules and policies, getting things done on time, and being consistent?

- Knowledgeable. Is the employee familiar with the requirements of the position?
- Organized. Does the employee have a process for managing work, setting priorities, and tracking progress and delays?
- Independent. Is the employee self-directed and able to work well with minimal supervision?
- Flexible. Is the employee able to embrace change, accept new challenges, and adapt to changing circumstances with grace and resiliency?
- Productive. Is the employee able to prioritize work, focus on the task at hand, and complete work within a reasonable amount of time, with minimal errors?
- Problem solver. Is the employee able to come up with solutions or seek assistance if needed when issues arise, team up in emergencies, and keep things moving smoothly so that there are no surprises?
- Communicative. Is the employee able to effectively convey pertinent information and avoid misunderstandings, use organizational communications tools, and engage with others, especially when working remotely?
- Manages Time Well. Is the employee able to prioritize tasks, plan and schedule work to be completed, and anticipate the unexpected?
- Meets Performance Expectations. Does the employee meet the organization's performance rating requirements to be considered eligible for hybrid work?

Other factors
- Adequate Home Workspace. This factor is two-fold. First, is the employee's home a suitable place to work from – free from significant distractions or activities? If there are others working at home or running a home-based business, such as childcare, the home may not be conducive to getting work done. Second, does the employee have a suitable place to work from in the home, preferably a separate room or quiet, designated work area? Also determine if the employee has a suitable ergonomic desk and chair, rather than working from the couch or kitchen table.
- Access to Technology. Does the employee have reliable, secure Internet access with sufficient upload and download speeds to perform work?

If the position is not suitable for remote work, even on an occasional basis, this should be communicated to the employee. If possible, consider offering other flexible work arrangements that provide alternate schedules from the traditional workday/week to help employees meet personal or family needs.

If the position is suitable for remote work but there are concerns about the employee's eligibility, managers should consult with their human resources department for guidance. Generally, the manager could set specific performance expectations that must be met before the employee can work remotely and then establish a trial period. If the employee meets the performance expectations during this timeframe, then the hybrid work arrangement can be extended on a permanent basis.

Rising above the barriers
The most common barriers associated with hybrid work include communication, collaboration, and performance. While these barriers may seem challenging at first, there are many proven ways to overcome them. Over time, these practices can become second nature in the workplace.

Communication - engaging employees remotely

There are several important aspects to communication in a hybrid work environment. First, the manager and remote employee must establish methods for communicating with each other on a regular basis. This can be by email, instant messaging, telephone, video chats and/or periodic one-on-one meetings in person or online.

Second, hybrid workers should never be perceived as "out of sight, out of mind" and need to be proactive about reaching out to management to consistently maintain "visibility." Remote employees must also communicate regularly with coworkers, clients, and other stakeholders. Again, this can be accomplished through a variety of communication tools, depending on what works best for the organization.

Setting communication expectations
Effective communication builds mutual understanding and trust in the workplace, so communication expectations should be clearly defined and understood by everyone:

- Hybrid workers should have a visible online presence throughout the day and be responsive to internal and external inquiries within a certain amount of time.
- Managers should make themselves available to staff and periodically check in with team members to get updates about the status of assignments and determine if there are any challenges the employee needs help with.
- Team members should identify any communications issues that arise and work together to fine-tune communication methods and improve collaboration.

The intent is to make sure everyone is kept informed and that hybrid workers are not inadvertently left out of important communications. This may require rethinking how information is disseminated.

- The use of team emails can be an effective way to make sure everyone gets the same message, and it is less time-consuming than calling a meeting. That said, team members must take responsibility for making sure they stay on top of reading their emails so important communications do not get overlooked.

- Team meetings are also an important way for team members to connect with one another and to facilitate communication and collaboration. Meetings should be strategic and have a specific purpose. Having more meetings does not necessarily mean better communication.

- Periodic one-on-one meetings are also important for discussing specific issues that do not require the involvement of all team members.

Holding effective remote meetings
In a hybrid work environment, it is not likely that everyone will be in the office at the same time; hence, meetings will most likely include remote and in-person participants. With hybrid meetings, in-person team members gather in a designated area and use an online meeting platform to bring remote participants "into the room" using audio/video or by phone. To make the best use of everyone's time, it is important to plan and conduct meetings as efficiently as possible by following a few simple steps:

1. Invest in the Right Technology. Use a stable online meeting platform that will meet the organization's needs and make sure everyone knows how to use it. This will help avoid unnecessary delays during the meeting. Set up practice sessions until everyone is comfortable using the platform

and its features, such as scheduling meetings, starting meetings, admitting participants, recording the meeting, and screen sharing.

2. Determine the Purpose of the Meeting. Have a clear understanding of what is to be accomplished during the meeting. Some of the most common types of meetings include status updates, problem solving, information sharing, decision-making, brainstorming, project kickoffs, team building, and debriefings.

3. Invite the Right Participants and Select a Date/Time that Works for Everyone. Make sure to invite key participants (those who must attend) and schedule the meeting based on their availability. Do not forget to account for different time zones when scheduling meetings. Send out meeting invitations so the date, time, and meeting link appear on the participant's calendar. Also, send out meeting reminders in advance.

4. Prepare an Agenda and Distribute it in Advance. Many meetings are unproductive because there is either no agenda or the agenda has not been well thought out. Take the time to frame the discussion. Distribute the agenda in advance so participants can come prepared to discuss the agenda items.

5. Stay on Track. Keep the conversation focused on the purpose of the meeting and be mindful of the time so the meeting does not run long. If side-bar issues arise that require further discussion, make note of them, and assign them to someone to address or add them to a future meeting agenda.

6. Record the Meeting. Most online meeting platforms provide the ability to record the meeting. This can be useful for future reference and to share with team members who were unable to attend.

7. Capture Main Points and Action Items. After the meeting, share the main meeting points and any action items with all team members. Also, save these notes in a location that is accessible by the team.

8. Videoconference Rules of Etiquette (Employee Section). Share these tips with team members.

Managing Hybrid Teams

Managing a hybrid team does not require reinventing the wheel. What it does require is deliberate conversations and decisions around establishing new processes, policies, and actions. From engaging in collaborations and listening to feedback, to encouraging teamwork and trust to create a great hybrid culture.

Collaboration

Focused Strategy – A large-scale study conducted in 2020 showed that Work From Home decreased collaboration hours but increased focus hours. The benefit of a hybrid workplace is that employers can have the best of both options. Employees can spend time connecting and collaborating with one another when they go into the office and concentrate on work that requires focus when they work at home.

Creating a New Culture – Collaboration is not limited to the office. The plethora of social technology tools (Slack, Zoom, G-Suite, Microsoft Teams) makes it easy for staff to have informal conversations, work through issues, and collaborate from a distance. Consider including virtual team building activities like games, challenges, and exercises you can do with remote employees to help build stronger bonds and include time for socializing before or after meetings. Facilitating dialog about how your team can work together helps individuals understand each other better, strengthens relationships, and improves communication.

Evaluating Performance

Manage by Results – Managing by results is an objective and effective way to evaluate employee performance regardless of where the work is performed. The focus is on setting clear expectations with

employees in advance and evaluating performance based on the timely and accurate completion of work based on these expectations.

Use Measurable Deliverables – The use of measurable deliverables is also conducive to evaluating performance. Tasks should contain action items with clear outcomes and priorities, as well as realistic deadlines. Employees should be involved in developing these expectations and deliverables that will be used to evaluate their performance. The goal is to get the work done effectively and efficiently and setting unrealistic goals does not benefit anyone.

Address Performance Issues – If an employee's performance declines under a hybrid work arrangement, it should be documented and addressed. Start by understanding the contributing factors that led to the decline in performance. The employee and supervisor may need to learn new ways to address communication and collaboration. Once the factors that led to performance decline have been identified, then expectations can be better defined and a timeline for improving performance can be established. If necessary, the hybrid work agreement can also be modified (change or reduce the number of remote days), or it can be suspended or terminated. Any action should be based on the provisions in the organization's hybrid work policy and in consultation with human resources staff.