

Below are some key principles to help manage your remote employees and set your team up for success.

Establishing clear expectations

- During the required trial period, establish and maintain open lines of communication and allow for adjustments that create better efficiencies or improve productivity.
- Once a remote work arrangement has been established, a written plan should be developed and approved by the manager and organizational leadership in order to document the understanding between all involved parties.
- The Institute will provide reasonable and necessary equipment (computer, monitor, keyboard/mouse, webcam, headset, privacy screens, pens, and papers) to enable remote employees to perform their work. The employee is responsible for all other expenses (printer, phone, internet, and utilities). Business related expenses should be reviewed with their supervisor.
- If the employee requested to work remotely, they are responsible for all commuting expenses (automobile, plane, etc.) when required to travel to Campus. However, the Institute may reimburse eligible commuting expenses if the Institute requested the employee to work remotely.
- Remote workers should be flexible and willing to come on-site for work-related meetings and events that are scheduled on a day that is typically designated as a remote workday.
- All parties should be prepared to return to pre-remote working arrangements if the goals of the arrangement are not being met.

Non-negotiable terms of remote work

- Employees must engage only in Institute work; no other substantial work should be conducted during agreed-upon work times. Remote work is not a replacement for child and adult care.
- At a minimum, team members should commit to responding to communications from colleagues and clients within the same timeframe as if they were on-site, unless otherwise agreed.
- Employees who work remotely—even occasionally—must provide and maintain a physically safe workspace that is reasonably free of disruption.
- Employees are expected to ensure their home office set up is ergonomically sound.
- Employees must adhere to the privacy requirements set forth by their division/department and the Institute.
- If attendance is required for on-site meeting or other in-office activities, the remote employee is expected to attend even if the meeting or event falls on a typically designated remote workday.

Ensuring business continuity

- All employees should have clear goals, deliverables, and deadlines for which they are accountable, whether or not in your line of sight. Setting clear expectations may be especially important for staff working remotely.
- Where appropriate, it may be useful if the employee sends you scheduled productivity summaries; a few lines noting accomplishments and status against targets can help keep you both on track.
- Maintain accurate tracking of all employees on remote work agreements, taking care to note start and scheduled end dates. Be prepared to review potential extensions.

Maintaining both formal and informal check-ins and communications

- Effective routines can anchor the team, putting them at ease, keeping them connected and reducing stress.
 - Continue to hold regular team meetings
 - Schedule formal one-on-one check-ins
- If informal, spontaneous check-ins are a part of your team's culture, such as saying good morning or stopping by someone's work area to ask how a project is going, those can be translated to IMs using a tool such as Skype for Business.
- Do not succumb to the idea that a colleague shouldn't be "bothered unnecessarily" when working remotely, unless that time is explicitly designated as do not disturb for concentrated work.
- Encourage regular check-ins with colleagues and customers.

Communication

- Protocols for communication and accountability should be established.
- Agree upon one or more approved communication tools for use amongst colleagues (e.g., cell phone, forwarding office line, Skype for Business, Slack, Caltech email, etc.).
- Examine your own behavior and what it signals to your team. (e.g. - Do you send emails at late hours?) Be clear about your expectations for when both exempt and overtime-eligible employees respond to you.
- Try email tools to schedule a delayed and more normative morning message delivery.
- An effort should be made to maintain a collaborative environment. Tools such as Microsoft Teams, Zoom, or other Institute supported platforms give your virtual team an efficient way to communicate when working remotely. Ensure employees have basic skills on using the tools; allow time for online training, if necessary.
- Encourage remote employees to turn on their camera if video conferencing to increase social connectivity.
- Create a space for sharing using a platform such as Microsoft Teams. Employees can share photos, movie recommendations, recipes, and more.

Even with remote work, there are times when face-to-face has its place

- Meetings that require many participants.
- Meetings that require shared visual focus that can't easily be translated by telephone or video conferencing.
- Difficult or complex conversations that would benefit by minimizing the relational gap by closing the physical gap.
- Team celebrations.

Pay attention to team success

- Ensure transparency about arrangements to protect against misunderstandings or the impression of favoritism or unfair treatment.
- Strive to maintain the social nuances and spontaneity (sometimes called the “water cooler effect”) that are key to engaged teams. Managers might consider inexpensive webcams for all office-based employees to enable remote employees to collaborate more easily via Zoom, Microsoft Teams, or other approved technologies.
- Innovation does not emerge just because of physical presence.

Measuring success, making adjustments

When measuring the success of a remote working arrangement, managers and employees should consider whether:

- The quantity, quality, and timeliness of work has been maintained, enhanced, or diminished.
- The work arrangement has met the expectations laid out in the original proposal.
- The work arrangement has affected, either positively or adversely, relations with the employee's colleagues, stakeholders, students and/or customers.
- The work arrangement has created a need for additional staff or caused other employees to assume more work.
- An employee has continued to comply with all Institute and division/department rules, policies, and practices.

Following a review, a manager and employee may decide to extend the remote work arrangement, make adjustments, or end it. If a manager determines that a remote work arrangement should end, that manager should make every effort to provide 30 days notice of such a change. There may be instances, however, when no notice is possible.

Remember that remote work is not an entitlement.