# Remote Work Guidelines for Senior Leaders, Managers and Employees

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The following guide supports the implementation of the <u>Remote Work Policy (PS 806)</u> and provides greater detail on the aspects of remote work. The guide is designed to support organizational leadership, management and employees by explaining the remote work arrangements process, providing remote work risk mitigation strategies and clarifying roles and responsibilities in exploring and implementing remote work.

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# 1. Is Remote Work Right for Us?

Remote work is the exception and not the rule. Establishing objectives for remote work is critical to shaping decisions and determining if remote work is right for the organization, the work unit or the individual. Remote work should be aligned with ministry strategic priorities (i.e., Ministry Strategic and Operational Plans, Strategic Workforce Plan, Culture Action Plan and Inclusion Action Plan) and operational or business needs.

Examples of the objectives for the employer:

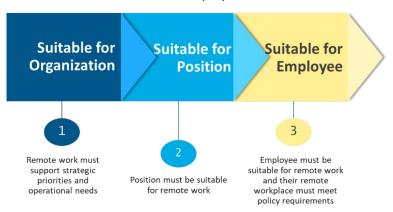
- Improve access to programs in remote communities;
- Attract, recruit and/or retain talent;
- Improve recruitment of diversity groups (e.g., Persons with Disabilities, Indigenous Persons, etc.);
- Establish business resiliency and continuity; and/or
- Respond to office space pressures.

Examples of objectives for the individual employee could be improved personal well-being, work-life balance and productivity.

It is important that objectives of remote work arrangements are clearly established and, where appropriate, communicated to all impacted stakeholders (e.g., management, employees, clients).

<u>Remote Work Criteria</u> helps to guide decision-making and to assess remote work on three levels: suitability for the organization, position and the individual employee. Above all, the arrangement must be in the best interests of the public, Executive Government and the employee.

For best results, it is important to engage organizational leadership, managers and employees; your HR Business Partner Team; and clients and potential stakeholders (e.g. Information Technology Division (ITD); ministry safety and privacy resources; corporate services branches; others), where it makes sense.



**Level 1 - Suitability for the Organization** (primary users are management and organizational leadership) The Remote Work Criteria provides guiding questions to help: determine organizational readiness; identify how remote work may contribute to the established objectives; and understand the impact on culture, operations, and service delivery. Results of these discussions should align with, and be incorporated into, ministry plans (e.g., Strategic Plan, Operational, Divisional or Branch/Unit Plan), where this makes sense. Employees are encouraged to also consider these questions in the context of their remote work application.

### Level 2 – Position Suitability (primary users are employee and management)

Not all positions are suitable for remote work and the Remote Work Criteria provides guiding questions to help determine if the position's duties can be performed remotely. Consideration is given to ability to measure performance, interact with clients, and the tools required to perform the position duties, as well as other factors.

# **Level 3 - Employee and Remote Workplace Suitability** (primary users are the employee and management)

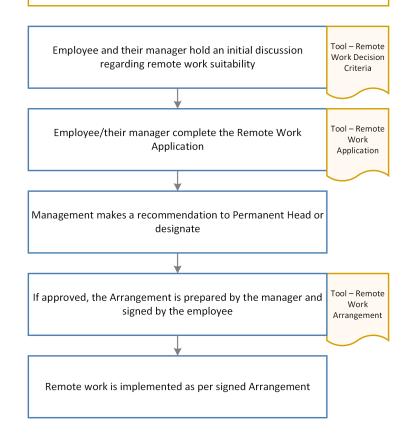
Not all employees are suited for remote work. The Remote Work Criteria provides guiding questions to help managers consider the employee's skills and competencies (e.g., time management, self-discipline, etc.), performance, and the potential remote workplace to assess suitability for remote work. If this criterion is not met, managers may work with employees to help them qualify for remote work opportunities in future.

# 2. Remote Work Arrangement Process

Tool - Remote Organizational leadership/management considers remote Work Decision work as a tool to drive business outcomes and makes a Criteria. **Business Case** recommendation to the Permanent Head and designate Template If approved, decision is communicated to the work unit, where remote work will occur For New or Vacant Positions For Encumbered Positions New/Vacant position may be Tool – Remote Employees are invited to apply posted and advertised as a Work Approval to work remotely Form remote work position Management assesses Remote work as a condition of Tool - Remote employee suitability and makes employment included in the Work Decision a recommendation to the Criteria employment documentation Divisional Head and designate Remote Work Arrangement is Tool – Remote If approved, Remote Work signed as a part of the Work Arrangement is signed Arrangement commencement process Remote work is implemented as per signed Arrangement

**Employer-Initiated Remote Work Process: Business Decisions** 

# Employer-Initiated Remote Work Process: Recruiting or Retaining an Individual Employee and Employee-Initiated Remote Work Process



# 3. Types of Remote Work

### 3.1 Employer-Initiated

Employer-initiated remote work can be driven at a ministry, division, branch or work unit level. To assess remote work as an option to achieve business and organizational outcomes, management may use the <u>Business Case Template</u> or any existing ministry-specific processes and tools.

When the employer initiates remote work, for example moving a specific service, work unit or a group of positions within a work unit to remote work:

- where positions are encumbered, employees will be invited to apply to work remotely (<u>Remote Work Application Form</u>). The process is similar to the employee-initiated process below.
   Manager will review with the employee their suitability and their potential workplace suitability.
- where positions are vacant or new, they may be posted and advertised as remote work
  positions. If remote work is a requirement, before making an offer, manager need to ensure the
  successful candidate meets policy requirements (see <a href="Remote Work Criteria">Remote Work Criteria</a>, <a href="Employee">Employee</a>
  <a href="Employee">Suitability</a>). Letter of offer, secondment agreement or other employment documentation
  should include conditions associated with requirement of remote work.

Where management initiates remote work for an employee with the purpose to retain or recruit talent, the same process as employee-initiated arrangements (outlined below) should be followed.

# 3.2 Employee-Initiated

Remote work may not be a viable solution to the employee's request (e.g., dependent care challenges, health problems). The manager and the employee should discuss remote work and alternative solutions (e.g., leaves of absence, variable hours) to determine which one may be more suitable before initiating the remote work process.

The employee should complete and submit the <u>Remote Work Application Form</u> to initiate the approval process. The manager will review the application, discuss with the employee fulfillment of the <u>Remote Work Criteria</u> (usage guidelines outlined above), and make a recommendation on remote work. Approval of remote work arrangements lies with the Permanent Head or designate. Management is encouraged to consult with their HR Business Partner Team and other stakeholders when making decisions.

It should be noted that even when it appears that all the criteria are fulfilled, there may be other circumstances that prevent the employer from approving remote work.

Approval is confirmed by a signed Remote Work Arrangement.

### 3.3 Occasional Remote Work

If the employee is requesting occasional (ad hoc, incidental) remote work, approval lies with their manager and does not require an application form or a signed arrangement. For additional guidance, refer to Occasional Remote Work Guidelines.

### 3.4 Out-of-Province Remote Work

Because employees who live or work in another province are normally subject to different tax rules and employment legislation, out-of-province working arrangements can create unanticipated obligations and liabilities for the employer. For example, workers' compensation coverage may not be available or

require additional premiums, health and/or dental coverage may not apply, or the employee needs to be equipped for the different health and safety requirements of the jurisdiction they are located in. Such arrangements should be supported only in rare and exceptional circumstances (e.g., desire to retain an exceptional performer and unique talent or leverage remote work to recruit a candidate for a hard-to-recruit position). Employee managers will be responsible for familiarizing and following the applicable legislation of the jurisdiction where remote work occurs.

Out-of-Province remote work arrangements must be approved by the Permanent Head and be undertaken only for a short period of time. Before approving out-of-province remote work consideration should be given first to alternatives such as filling the position with Saskatchewan residents, leave of absence for the affected employee, or re-location of the job candidate to Saskatchewan.

HR Business Partner Team should be notified immediately when out-of-province remote work is being considered or any subsequent changes to employee status such as early termination of the out-of-province remote work arrangement, change in the employee's province of residence, etc.

### 3.5 Remote Work vs. Medical Accommodation

If the employee is seeking a remote work arrangement for medical or health-related reasons, these requests are governed by the <a href="Employment Accommodation Policy">Employment Accommodation Policy</a> (PS 705) and the Be At Work Program. For information on this process contact your HR Business Partner. Where remote work is the outcome of the Be at Work Program and the Employment Accommodation Policy (PS 705), the <a href="Remote Work Arrangement">Remote Work Arrangement</a> should be modified to reflect the recommended accommodation.

# 4. Approval, Review and Termination of Remote Work Arrangements

Before completing a <u>Remote Work Arrangement</u>, the manager should consider the impacts of the remote work on the operations, team and culture to identify risks. The arrangement helps to mitigate those risks and build a common understanding of the arrangement.

The policy outlines standard expectations and costs associated with a remote work arrangement. Where exceptions to the policy are considered, that result in additional costs to the employer, the manager should complete cost/benefit analysis and comparison with other approved exceptions within the ministry. Those exceptions are subject to the Permanent Head or designate approval and are to be captured in the signed arrangement for future reference (e.g., tax documents).

Business needs and position requirements evolve over time and adjustments and modifications to remote work arrangements may be necessary; arrangements should not be considered permanent.

Management is responsible for regular evaluation of remote work success against the set objectives, including the impact of remote work on business, service delivery, operations and culture.

Remote work arrangements shall be reviewed informally on an ongoing basis, formally after the first three months and annually thereafter using the existing work planning and performance review processes.

Some examples that could trigger modification or termination of a remote work arrangement include:

- Change to business needs or service delivery model;
- Position or position requirements change;
- Performance falls below an acceptable level; or
- Employer, manager or employee request.

A notice period should be provided in advance of ending or changing an arrangement to allow sufficient time for the manager and/or employee to make any arrangements that might be necessary. Normally, the length of the notice period is 30 days, but it may vary depending on the situation. Employer may ask employee return to the headquarters building effective immediately, with the Permanent Head support.

Employee manager is responsible for keeping remote work information up to date in MIDAS and needs re-submit the <u>Remote Work Status Tracking in MIDAS Form</u> in the event of remote work arrangement changes (e.g., arrangement term has been extended, type has changed from part-time to full-time, arrangement has been terminated). The form is not required if Termination Notification Form was already sent to the HR Service Center.

# 5. Making Remote Work Work

Implementation of remote work can have broad implications for leadership, management, employees and the workplace overall. Managing potential risks is important to meet the remote work objectives and maintain an effective arrangement.

The table below outlines potential risks and corresponding mitigation strategies, including additional tools, resources and supports that could be used by management and employees to enable effective remote work arrangements. If mitigation strategies do not work, review or termination of the arrangement should be considered.

# Risk

# Mitigation Strategy

# **Process Ambiguity**

- Employees or managers do not follow agreed upon processes related to remote work arrangements
- Document the terms of the remote work arrangement up-front and ensure sign-off by both the manager and employee.
- Use resources available to support awareness and understanding of arrangements.
- Ensure processes are remote-work-friendly (e.g., electronic forms vs. paper or virtual meetings vs. in-person).
- For new employees, ensure that your onboarding process is sufficient to help them get started, adjust as needed.

# Culture, Attitudes and Engagement

- Unwillingness on the part of some leadership/ management/ employees to accept the remote work arrangement
- Seek support and championing from senior levels within the ministry.
  - Involve employees, management and others affected in decisionmaking.
- Maintain ongoing communication to communicate successes, lessons learned, etc.
- Use change management practices when implementing changes to the workplace.

# Culture and Managing Remote Teams

- Staying connected and maintaining team and organizational culture
- Negative impact on the morale of staff not able to participate in a remote work arrangement
- Lack of good people management skills

- Establish clear expectations on how and when employees need to be available.
- Ensure that the arrangements under which all staff will be working are clearly and openly communicated (e.g., employee John Smith working remotely on Monday and Tuesday, or employees A and B will continue working from the headquarters building). Provide opportunities for discussion and feedback among the team.
- Ensure decision-making regarding remote work is a transparent process and considerations are clear to all affected.
- Whenever possible and makes sense, managers and ineligible employees should work together to develop a plan that may allow for future participation in remote work.
- Consider leveraging occasional remote work where applicable.
- Ensure changes to work practices and processes have been made as necessary (e.g., work and team meetings protocols, adapt team activities to suit remote employees).

### Risk

# **Mitigation Strategy**

- Create opportunities for connection to support team development, work collaboration and professional growth (e.g., partner remote and non-remote employees on assignments, schedule online "coffee" and other informal interactions).
- Schedule regular check-ins with your colleagues to stay connected.
- Just as at the headquarters building, schedule one-on-ones and team meetings to maintain ongoing communication and connections.

# Hours of Work, Pay and Benefits:

- Blurred lines between remote work and hours of work, pay and benefits policies
- Ensure remote work adheres to applicable collective bargaining agreements, HR Policy Manual and Financial Administration Manual.
   For example:
  - Follow position's hours of work;
  - Overtime must be approved;
  - Advising manager and using sick leave, when feeling unwell and unable to work;
  - o Use leave of absence policies, where appropriate; and
  - Eligibility for reimbursement for travel, meals and accommodations.

# Performance Management:

- Difficulty meeting performance expectations
- Decreased client satisfaction
- Professional development may be limited
- Performance management frameworks that would apply at the headquarters building should assist managers to support employee performance remotely (i.e. <u>Performance Improvement Policy and</u> <u>Guidelines</u>).
- Performance expectations are clearly understood by the manager and employee. These include but are not limited to, monitoring employees' key performance metrics (e.g., productivity metrics, cases closed, customer feedback, satisfactory task completion, work objective fulfilment, successfully achieving outcomes).
- Work and Learning Plan or Planning for Success is in place and reflects employee participation in remote work arrangements.
- Development and training options are reflective of remote work arrangement and incorporated into work plan.

### **Health and Safety:**

- Creating and maintaining a safe workplace, is challenging outside of headquarters
- Employee mental health may be negatively affected by remote work
- Employee and manager should work together to assess and bring the workplace to the standard outlined in the policy.
- Using the <u>Remote Work Safety Checklist</u>, photos and/or video conference to walk through remote workplace requirements and ensure it is safe and appropriate to the nature of work.
- If there are concerns, the employer may choose to conduct or outsource a remote workplace inspection, given reasonable notice to the employee.
- Consult with Health, Safety and Wellness resources in your ministry for health and safety considerations, as appropriate.
- Health and safety requirements must be examined and addressed before remote work begins.

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# **Mitigation Strategy**

- Work-related incidents and near-misses need to be <u>reported</u> immediately, as <u>per Incident Reporting and Investigation Policy (PS 818)</u>. Refresher <u>Incident Reporting Policy Training e-learning</u> may be beneficial.
- Employee psychological health is observed on an ongoing basis through maintaining contact and discussions.
- Explore mental health resources and encourage employees to find resources at Lifeworks EFAP Virtual Platform. You can access it at <a href="mailto:efapgos.lifeworks.com">efapgos.lifeworks.com</a> and through the LifeWorks app.
- Remind employees about <u>Employee and Family Assistance Program</u>.

# IT and Equipment:

- Employee IT and other equipment and infrastructure is not sufficient for remote work
- Inappropriate use of employer-provided equipment
- IT Security risks for remote work

- Technology and equipment requirements have been assessed and addressed prior to beginning remote work.
- All required equipment should be obtained through the headquarters. Employees are expected to pick-up their equipment in most cases, in some cases equipment can be delivered through a courier.
- Internet bandwidth is at the level required to enable video conferencing, phone calls, etc. and is available (e.g., others may be using the service at the same time). If employee has issues, they should contact their service provider for recommended bandwidth or the Service Desk (ITD) for advice on increasing their bandwidth.
- Employee is familiar with the Information Security Policies.
- Employee completes <u>Security Awareness 2020</u> and <u>Overarching Security Policy</u> e-learning.

# Privacy and Records Management:

- Appropriate information management outside headquarters building is challenging
- Employee is familiar with their duty to protect personal information and personal health information.
- Ensure that reasonable safeguards are in place, regardless of location.
- Position is adapted to be performed primarily paperless.
- Employee completes the Introduction to Records Management training and Access and Privacy in the Government of Saskatchewan training within the first three months of working remotely.
- Employee is familiar with <u>the Privacy Manual</u> and <u>the Information</u> Security Policies.
- Employee is familiar with the Workstation Checklist.
- Employee is familiar with <u>Electronic Messaging Considerations</u>.
- Employee is familiar with <u>Guidelines for Records Management</u> Outside of the Office.

### **Operational:**

- Difficulty attracting staff to take on special projects or new roles if
- Seek support from your HR Business Partner Team to correctly outline operational needs and suitability.
- Leverage occasional remote work, where this makes sense.

# Risk

# required to give up remote work arrangements

- Improper identification of position suitability
- The short- or longterm costs may outweigh the benefits
- Negative effects of remote work on client service

# **Mitigation Strategy**

- Implement protocols regarding unforeseen events and staff availability requirements.
- Schedule part-time remote work to ensure multiple employees are not working remotely on the same day.
- Short- and long-term costs are identified (i.e., laptop/phone, furniture, supplies, administration, etc.), assessed, reflected and approved as part of regular program budgeting/forecasting processes.
- Responsibilities to incur costs are clearly communicated and established as part of the arrangement between employer and employee.
- Regularly monitor and evaluate effects of remote work on client service, adjust as necessary.

# 6. Explore and Implement Remote Work: Role of Senior Leaders, Managers and Employees

Shifting to remote work requires us to embrace new ways of working and to ensure that remote workers and teams are connected and pursuing common goals. Remote work can be challenging to implement without engagement of all those affected by it. Senior leaders, managers and employees play an important role in in exploring and implementing remote work and ensuring it is effective:

	Senior Leaders	Managers	Employees
Explore Remote Work	✓ Identify where remote work is an opportunity to drive business outcomes and employee engagement.	<ul> <li>✓ Assess where remote work can help drive organizational business outcomes and contribute to or enhance positive team culture.</li> <li>✓ Challenge mindsets and perceptions about remote work (yours and others).</li> <li>✓ Understand that remote work is not a suitable mechanism to solve inter-personal or workplace culture issues.</li> <li>✓ Ensure that remote work is in the interest of both the employer and the employee.</li> </ul>	<ul> <li>✓ Understand that remote work is not an employee right, but a privilege.</li> <li>✓ Consider remote work impacts on your personal and professional life.</li> <li>✓ Speak to your manager about the pros and cons of remote work and feasibility within your work environment.</li> </ul>
If Remote Work is Pursued, Implement Meaningfully	<ul> <li>✓ Demonstrate leadership buy-in and shift culture and perception.</li> <li>✓ Put remote work on the organizational agenda.</li> <li>✓ Understand and communicate the opportunities remote work can create to support the achievement of business outcomes (e.g., recruiting a highly skilled and diverse workforce).</li> <li>✓ Support and guide managers in remote work implementation.</li> </ul>	<ul> <li>✓ Analyze enablers and barriers to remote work within your teams.</li> <li>✓ Re-think the way work is done and if remote work can be operationally feasible and beneficial to your work unit.</li> <li>✓ Use remote work to attract, recruit and retain talent.</li> <li>✓ Use remote work as a mechanism to support work and personal life balance, which can improve employee morale and organizational culture.</li> <li>✓ Ensure that employees are aware of the work unit's remote work goals and expectations.</li> </ul>	<ul> <li>✓ Understand the remote work process and requirements.</li> <li>✓ Help to identify a remote work arrangement that best suits you, your team and your organization.</li> <li>✓ Help your manager and your team to understand the benefits of remote work to be achieved by you and your organization.</li> </ul>

	Senior Leaders	Managers	Employees
		✓ Use effective people management strategies when managing a team with remote workers.	
Evaluate Regularly and Demonstrate Value	✓ Acknowledge successful or unsuccessful remote work arrangements: celebrate success and share lessons learned.	<ul> <li>✓ Use existing work planning tools and have ongoing, open discussions about performance, expectations, and challenges with remote workers.</li> <li>✓ Identify what successful remote work is for your work unit and implement measures (e.g., employee engagement, productivity, client satisfaction, team connectivity, diversity representation, etc.).</li> <li>✓ Evaluate regularly and celebrate success or share lessons learned.</li> </ul>	<ul> <li>✓ Evaluate (and measure, where possible) remote work success at work and in your personal life against your objectives for remote work (e.g., changes in sick leave usage, performance, productivity, perception of work-life balance, connectivity with the team, relationship with management, ability to unplug after the working day, mental health).</li> <li>✓ Share within your team your challenges and successes.</li> </ul>
If Remote Work is not pursued	✓ Communicate direction, build shared understanding on all levels of the organization.	<ul> <li>✓ Cascade organizational direction to employees.</li> <li>✓ Create space for open discussions.</li> <li>✓ Leverage other tools and policies that support employer flexibility (e.g., flexible hours, occasional remote work), where this makes sense.</li> </ul>	<ul> <li>✓ Remain flexible; acknowledge and accept decisions.</li> <li>✓ Work with manager to identify alternatives to remote work arrangements (e.g., flexible hours, occasional remote work, etc.).</li> </ul>

# **Appendix A: Remote Work Policy Tools Inventory**

The <u>Remote Work Policy</u> comes with six supporting tools and templates. Here is how and when to use them and how they help in remote work implementation.

Purpose	Policy Tool	Users	About the Usage
Considering remote work?	Remote Work Criteria	Leadership, management and employees	This is <b>step one</b> to any remote work arrangement.  This tool includes robust comprehensive criteria for discussions and decision-making. It is designed to support consistency of remote work application and, overall, what to consider when deciding on any remote work arrangement.  This tool can be equally used by leadership or management for business decisions; in management discussions about possibilities of remote work for their team; for conversations between employees and their managers; by employees considering applying for a remote work.
Considering remote work? Need approval for your remote work ideas?	Business Case Template	Leadership and management	Supplementary tool to <b>step one</b> .  Tool is designed to support leadership or management in creating a business case for employer-initiated remote work. Usual business case elements are adapted to the remote work policy help to consider and provide all information required to make decisions.  This tool cannot be used without the Remote Work Criteria.  Leadership/Management may use any ministry-specific business case templates instead and follow internal approval processes.
Want to apply for remote work?	Application Form	Employees and management	This is <b>step two</b> to any remote work arrangement.  The Application Form is designed to support a process of <u>individual</u> remote work applications and formalize decisions. Managers can use this form to approve remote work to retain or recruit an individual employee. Employees can use this form to initiate a remote work arrangement.  This form is also to be used by employees applying for remote work when the employer moves a specific service, work unit or group of positions within the unit to remote work. In such instances, the purpose of the application is to determine suitability and approve affected employees for remote work.

Purpose	Policy Tool	Users	About the Usage
			This tool cannot be used without the Remote Work Criteria.
Preparing to implement remote work?	Arrangement Form	Employees and their managers	If approval to proceed is received, this is <b>step three</b> to any remote work arrangement.  Arrangement is designed to solidify the approval.  Before completing an arrangement, the manager should consider the impacts of the remote work on the operations, team and culture to identify risks. The Arrangement helps to mitigate those risks and build a common understanding of the arrangement.
Preparing to implement remote work?	Safety Checklist	Employees and their managers	Supplementary tool to <b>step three</b> .  Employee and manager shall work together to assess and bring the workplace to the standard outlined in the policy. The checklist is designed to support them in this.  How to use the checklist? With the help of photos and/or video conference walk through the remote workplace requirements and ensure it is safe and appropriate to the nature of the work. Include actions to resolve any identified health and safety concerns and ensure they are implemented before remote work starts.  The completed and signed checklist is an attachment to the signed arrangement.  Use the checklist to audit the remote workplace, as required, to ensure it still meets policy requirements.
Have a question about remote work?	Key Messages and Q&As	Management and employees	It is designed to be used during steps one, two or three. Reference the Q&A document when you need help. You can find answers to many frequently asked questions there.