

# HR TOOLKIT

## Leading Remote Teams

Provided by: Taggart Insurance



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# Introduction

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Due to the coronavirus disease (COVID-19) pandemic, many organizations are offering remote work options to more employees than ever before—sometimes out of business necessity. Numerous studies show that remote work had expanded even pre-coronavirus, and continued growth should be expected as employers prepare return-to-work plans. Expanded use of the remote workplace can offer numerous benefits to employers. These benefits include access to a broadened talent pool, reduced costs and more—though a successful virtual workplace isn't created without obstacles. Both remote employees and teams face unique challenges—however, leaders can address these barriers with proactive planning.

While, in some cases, remote work is being adopted out of necessity, many employees feel confident in their abilities to fulfill their roles remotely. The Harris Poll conducted a survey on behalf of Glassdoor among nearly 1,000 employed adults during the COVID-19 pandemic. Results indicated that 60% feel confident in doing their job efficiently from home, even if it means doing so indefinitely. The same survey also revealed that 50% believe they would be equally or more productive working remotely.

When implementing remote work, employers often first address obstacles such as establishing remote work expectations and ensuring all employees have the technology they need. Once initial challenges are addressed, employers often begin considering how to maximize the remote workplace—including how to best lead remote employees and teams, while ensuring that a strong company culture remains in-tact.

When planning how to address challenges and create an environment for successful remote teams, leaders will focus on best practices that support organization and team dynamics—but also, each individual employee. This toolkit will provide you with considerations for having employees and teams succeed in a remote environment, and how to address common challenges.

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# Remote Work Planning

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When planning for how to best lead organizations, teams and each employee in the remote workplace, employers should begin by ensuring tactical planning is completed. Initial steps for remote work planning include topics such as creating expectations for remote work, developing appropriate policies and ensuring remote employees have the technology they need to succeed.

## *Schedules*

Ensure that employees receive clear expectations about the hours they are expected to be online. Schedules will vary depending on your organization and the position—regardless, schedules and hour expectations are a core component of any remote work planning.

## *Technology*

Technology preparations will include planning for each employee's workstation, as well as software and required access. Detailed technology planning can remove headaches ahead of time and create a smooth experience for employees beginning remote work.

## *Employee Workstation*

Employers will want to determine which components of the workstation they will provide and which components will be provided by the employee. As employees will be spending a significant amount of their day at this workstation, take steps to help ensure that it is comfortable and safe, with high-functioning technology. Common components of a safe workstation include:



**Computer**—Ensure remote employees have a high-functioning computer with adequate capabilities for their roles and responsibilities. If the employee will be engaging in video calls, ensure the computer includes a webcam.



**Supporting technology**—While a workstation setup should include a charger, headset and mouse, optional considerations include an external monitor setup, a printer or other equipment relevant to the employee's responsibilities.



**Reliable broadband connection**—A minimum of 1.5 Mbps (megabits per second) is a good benchmark for bandwidth requirements. For reference, popular video-conference tool Zoom recommends a minimum of 1.2 Mbps of bandwidth to best use their software for high-definition video calls, according to its website.



**Ergonomic work location**—Employees should have a space with minimal distractions for a home office. This will include an ergonomic location, with room for all necessary equipment.

For a reference of standard components of a remote workstation setup, review the [Remote Workstation Checklist](#), which is included in the [Appendix](#).

## *Policies*

Employers using the remote workplace should consider having a written [Telecommuting Policy](#). A template for this is included in the [Appendix](#) of this toolkit. By having employees review or even sign a policy, employers can ensure that employees are aware of expectations.

When developing policies, you may also want to consider including remote-specific expectations in policies and literature—for example, remote-specific dialogue in your employee handbook. Other remote-specific policies may include a [Remote Anti-harassment Policy](#)—an example of which is also included in the [Appendix](#).

When making any changes to policies, employers should consult with local legal counsel.

## *Interviewing and Onboarding*

### **Virtual Interviewing**

When expediting remote and virtual practices, interviewing is a consideration for many employers. While the process of virtual interviewing may even be a required option for many employers in wake of the COVID-19 pandemic, this practice is a strong option when evaluating interview processes, even post-coronavirus.

As employers adapt to stronger technology capabilities than ever before, virtual interviewing offers an opportunity for employers to become more adaptable, while staying up to date with growing trends. Many job seekers frequently use job websites such as LinkedIn, Indeed and Handshake, and the expanded use of technology is challenging recruiting and hiring norms—leading to virtual interviews becoming a strong consideration for employers. In addition, virtual interviews can offer benefits such as time savings, flexibility and reduced costs. Virtual interviewing benefits also extend to job seekers. For example, for an applicant who has a full-time job, it will be much easier to join a phone or video interview, rather than spend the time traveling to a location and missing up to a day or more of work at their current place of employment.

To prepare for virtual interviews. Employers can take steps, including:

- Review federal, state and local laws related to employment and hiring practices.
- Write job descriptions and include necessary details as determined, such as the salary range and hiring manager.
- Choose what type of interview you will conduct, such as a phone screening or video interview.

- Plan ahead and test technology—effective use of technology will be a core component of effective virtual interviewing.
- Plan a standardized virtual interview process, and establish an objective method of evaluation so you can fairly compare candidates.

For employers new to virtually interviewing and hiring a new employee, it can be a daunting process. The interviewer or hiring manager is responsible for finding and hiring an individual who will be a productive member of the team, without ever interviewing them in-person. While presenting a new set of challenges, virtual interviewing can offer benefits for employers when done effectively. If conducting virtual interviews, key considerations include:

- Use video platforms for final or selection interviews, if possible.
- Create a comfortable virtual environment for the candidate, and ask open-ended questions.
- Establish the same level of professionalism as would be expected in person.
- Continue to hire based on qualifications for a position.


To view steps for planning a virtual interview process, review [Virtual Interview Preparation Action Items](#), found in the [Appendix](#).

## **Remote Onboarding**

As employers prepare post-coronavirus plans, it's not just seasoned employees working from home—it's also new hires who may be joining your team. Remote onboarding refers to completing an onboarding process primarily or entirely in a virtual or remote fashion, with the intent of that employee primarily telecommuting. This includes acclimating remote hires to their new roles, setting clear guidelines for performance and company culture, and sharing the necessary knowledge for a new employee to succeed within a remote environment.

If onboarding new employees on your team remotely, consider the following steps as part of your onboarding plan:

- Plan ahead for technology, including the employee's workstation, software and access.
- Preboard the new employee to the extent possible, which may include addressing HR tasks ahead of time.
- Provide the new employee with a welcome kit that includes company materials and giveaways.
- Prepare for an effective first week, including engaging content, planned introductions with the employee's manager and peers, and hands-on involvement with a project.



As you welcome new employees to your virtual team, plan ahead to get off to a strong start. When planning steps for a remote onboarding process, consider steps listed in the [Remote Onboarding Checklist](#) in the [Appendix](#).





# Company Culture in the Remote Workplace

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Many organizations take pride in their company culture. Often, it can be a core competency and a competitive advantage. As employers expand remote work opportunities to more employees than ever before, organizations may want to consider how their culture can stay intact through an increased virtual workspace. Consider how your company culture can translate to the environment of your team.

## *What Is Company Culture?*

Company culture is the personality and environment of an organization. Defined by more than just a mission statement or organizational values, company culture encompasses the unwritten norms of how individuals act with one another. While poor company cultures can be detrimental, a strong company culture and positive employee morale can positively impact recruitment efforts, retention and the bottom line of an organization.

The Society for Human Resource Management breaks down company culture into three broad categories:



**Social**—How individuals act, and how authority and influence exist between different roles and teams



**Material**—How people in a group make or achieve something, and the ways people work with and collaborate with one another



**Ideological**—How values, beliefs and ideals establish how individuals exist and interact

Company culture has long been associated with the way interactions take place. In the absence of face-to-face conversations, that same company culture translates through interactions taking place via communication channels such as email, phone, video, instant messaging, employee intranets and more. As the utilization of remote work expands, employers may want to consider how their culture is translating into the virtual workplace.

## *Strong Company Culture*

Company culture should align with the mission statement and values of an organization—this will vary from workplace to workplace. According to Glassdoor, positive company cultures have universal themes that matter in today's economy. These include:

- Agility
- Collaboration

- Customer focus
- Diversity
- Execution
- Innovation
- Integrity
- Performance
- Respect

Many organizations take pride in their company culture, and expanded remote work doesn't mean that culture can't exist in the remote workspace—leaders should be deliberate about ensuring their teams' behaviors are in alignment with organizational expectations.

## *Establishing Company Culture in the Remote Workplace*

Effectively expanding company culture into the remote workplace is about more than just creating policies and adjusting business practices—the actions and behaviors of employees will continue to define a culture, just as in any work location.

Within the remote workplace, there are ways that employers can help expand positive attributes of a culture to those engaging in remote work. Options for employers to consider include encouraging behaviors, implementing practices and rethinking employee engagement, while keeping the following tips in mind:



**Focus on the why**—An organization's mission statement, purpose and objectives can be a source of meaning for many employees. Ensure that these goals remain at the forefront of communications.



**Prioritize collaboration**—As in any workplace, employees are engaged when they are collaborating and feel as if they are part of a greater cause. While employees will be spending a significant amount of time alone, be intentional about facilitating collaboration with projects, goals and objectives.



**Rethink communications**—Company culture lives through the actions of employees and how individuals communicate with each other. While word-of-mouth can no longer be the primary medium for engagement, be strategic about how different communication channels are used, such as employee intranets, social networking tools and video.

While establishing company culture is an organizationwide effort, these tips can apply directly to your team.

## *Desired Behaviors*

Company culture is defined by how individuals interact—whether in a physical workplace or in the remote environment. Organizations can take steps to help facilitate an environment where a positive company culture can be established in the remote workplace.

While employers can implement policies and document expectations, it will be the choice of employees to buy into it. Encouraging positive behaviors will take more than just policies or guidelines—actions can have an immense impact. Leaders often have significant influence, and employees will feel comfortable reciprocating when management is living out expected behaviors every day. Desired behaviors will vary, as every organization strives for a unique culture. However, consider how leaders at your organization can be a contributing force in establishing desired behaviors and your desired company culture.

# Supporting Each Employee

To effectively lead a virtual team, you'll be tasked with managing a team dynamic and group interactions—while supporting each employee. When addressing remote-specific challenges, managers can take steps to create an environment in which each employee can be a productive member of a successful team.

## Remote Challenges

Remote employees face unique challenges. While numerous studies show that remote employees can achieve levels of productivity that are the same as or higher than their non-remote peers, this isn't without obstacles. According to the Harvard Business Review, challenges remote employees often encounter include:



Lack of face-to-face interaction



Social isolation



Limited or lack of access to necessary information



Distractions within the employee's home



Lack of motivation

Managers should acknowledge these challenges, but can also take steps to address obstacles their team members may encounter. This section offers considerations for addressing challenges your employees may face in the remote environment.

## Employees Who Struggle in the Remote Environment

While many employees thrive in the remote environment, you may find that some members of your team struggle. While managers may be able to keep an eye out for these types of queues more easily in-person, monitoring employee performance can present new challenges in the virtual environment. But, by being aware, you may be able to notice employee struggles. For example, if an employee who typically is well-organized and a high achiever suddenly seems to be missing deadlines, that may be a sign there is something else going on. When dealing with employees who struggle to perform remotely, suggestions for managers include:

- **Create accountability**—While accountability applies to each employee, it also applies to managers. Managers can show they care and take ownership in each team member's results, and take accountability for providing adequate support.
- **Identify changes**—Has the employee had a recent significant change of any kind? Have there been updates to their work responsibilities? Changes in their personal life? Partner with each employee to identify the cause of challenges they may be facing.

Check in with the employee by asking questions rather than starting the conversation by addressing their poor performance. You may be able to uncover issues and address them accordingly.

- **Reengage as necessary**—Consider readjusting an employee's responsibility. For example, if they're losing focus, engaging them with work that involves problem-solving may help rebuild their sense of engagement.

Ultimately, leading effective remote teams will start with understanding that each employee will react and perform in the remote environment differently. Challenges don't just extend to team members, but to leaders and managers as well. By adequately supporting each employee, the stage can be set for productive teams.

## *Boosting Self-motivation for Remote Employees*

You may find that self-motivation takes a different form in the virtual work environment. According to a study conducted by the Harvard Business Review, remote employees were less motivated than employees who work in an office. In contrast, employees who did not have a choice in their work location were found to be less motivated than those who had a personal choice of location.

To boost self-motivation for remote employees, leaders can consider the following practices:

- **Empower employees to solve meaningful problems and experiment**—According to the Harvard Business Review, employees who are allowed to solve meaningful problems or experiment report higher motivation—regardless of where they are working. Consider how to find ways to engage employees with high-level contributions.
- **Measure motivation**—Communicate to employees that self-motivation is the desired outcome. Set goals and measure accordingly to reach them. This could be completed through productivity measuring tools—or even through surveys completed by employees.
- **Allow employees to showcase their achievements**—Employees take pride in their work—when in remote locations, natural opportunities to showcase and discuss accomplishments may be scarce. Find ways to let remote employees talk about their achievements, such as during team meetings.

Remember, each employee is unique. Some employees may adapt well to a remote environment, while others may need individual support to achieve a high level of performance and personal well-being.

## *Providing Support*

As employers consider how scheduled meetings, virtual events and new technologies can be introduced, managers can also think about how they can best support their teams as a

resource. An effective management strategy should include offering emotional support and providing encouragement to both individuals and teams. Asking open-ended questions to employees will allow them to speak their minds, and managers should focus on being good listeners. While it may be easy for a manager to pick up on social queues in the office, even the most effective leaders remain more distant in the remote environment. While these challenges persist, being intentional about providing support to employees can help remove any barriers.

While many employees will reach out to their manager directly, some may need more direct support. Managers can support this by being proactive and connecting with each team member—the following are ways that managers can facilitate this:

- **Schedule one-on-one check-ins**—By gauging how each employee is doing, leaders can evaluate how to meet the unique needs of each employee.
- **Provide emotional support**—Asking open-ended questions can allow employees to speak their minds. Leaders should focus on being good listeners and providing appropriate support.
- **Establish expectations**—An increased level of ambiguity can put undue stress on remote employees—by establishing clear goals and objectives, employees can stay on the same page with their manager.

Similar to an in-person work environment, leaders are tasked with maximizing the efforts of their employees. While teams may face the challenge of being isolated in the virtual environment, managers can be a great resource for their team—and for each individual team member.

# Team Collaboration

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Ambiguity often presents challenges for remote team members, and managers can take steps to both communicate specific objectives and foster a strong environment for collaboration. By outlining details of roles, responsibilities, timelines and expectations, employees will feel less stressed about what's expected of them.

While managers face unique challenges of supporting each employee within the remote environment, challenges also lie within the team dynamic. Managers may need to be intentional about building team comradery, and putting the correct steps in place to have teams that are collaborative, productive and effective.

## *Using Technology*

Think about how you can use technology to effectively build communication dynamics within your team. In the physical workplace, tasks and expectations are often discussed via word-of-mouth. Effective use of technology in a remote setting can not only ensure all team members are on the same page, but also help build team chemistry.

## **Communication Channels**

Leaders have various options for what communication channels to use. Remember, no communication medium is a one-size-fits-all solution. While most leaders are familiar with communication channels such as email, phone and instant messaging, consider how other platforms can be used to help boost your team's effectiveness:

- **Video**—Many effective video platforms exist, such as Zoom and Microsoft Teams. Using video as a communication medium can help build team chemistry and allow team members to showcase more emotion and visual cues than phone calls or emails allow. Video doesn't need to be the one-size-fits-all solution for meetings, but—for certain types of conversations, such as sensitive or critical topics—the close replication of face-to-face conversation can allow for effective communication.
- **Project management tools**—Communicate to employees that self-motivation is the desired outcome. Set goals and measure accordingly to reach them. This could be completed through productivity measuring tools, or even through surveys completed by employees.

## *Promote Collaboration*

Rather than assigning work solely to individual employees, consider structuring tasks and projects in a way that promotes collaboration, without it seeming forced. When employees are collaborating, they will feel more engaged as part of a team. When collaboration is part of the standard day-to-day, it won't seem as forced and will be part of the team dynamic.

When tasked with high-level objectives that involve problem-solving and experimentation, consider how your team can collaborate. Unique skill sets and tribal knowledge exist within different team members. Numerous studies show that teams are able to create stronger outputs than individuals alone. And, when your team is highly challenged, it can be a great opportunity to build trust. Collaboration improves the chemistry of your team, and highly collaborative teams can be productive and produce good work.

### *Establish Accountability and Trust*

Though collaboration is key for a high-functioning team, individual accountability remains critical. Not only will employees appreciate having a defined area of contribution, but accountability will ensure that team goals, objectives and deadlines are met. Passing off responsibility to individual members can also help build a core component of a team—trust.

### *Team Check-ins*

Schedule frequent team check-ins. Frequent team dialogue will make members feel comfortable consulting with managers if regular meetings are part of a scheduled routine. Daily check-ins also help ensure that all team members can share their ideas and stay on the same page.

### **Highlight Achievements**

Team meetings can allow an opportunity for each employee to showcase their hard work. During each check-in, consider meeting formats that allow an opportunity for each employee to have a chance to speak—whether it be to share their thoughts on an idea, or to discuss projects they are working on. Some team members will naturally be more extroverted. Still, by structuring team meetings so that everyone has a chance to participate, everyone will have the opportunity to have their voice heard. Some team members will be naturally quieter in group environments; however, that doesn't mean they aren't equally talented team members.

Highlighting achievements doesn't need to lie solely on employees—leaders can use team or organization meetings to share employees' accomplishments. While employees appreciate positive feedback in a one-on-one environment, receiving accolades in front of their peers can be a confidence booster. While team meetings can be an opportunity to have candid and necessary work-related conversations, creating a positive environment will make members look forward to joining and participating in team check-ins.

### *Building Comradery*

Ideally, a team's workflow will naturally build team comradery through collaboration and sound work processes. However, leaders can be proactive to best ensure that all team members are engaged while creating a high level of chemistry. Non-work engagement and interactions can help build comradery within a team. Though frequent chatting around the water cooler or social outings such as team happy hours may not be feasible in the remote environment, there are still opportunities for leaders to consider.



Creating engagement opportunities may include a virtual happy hour or virtual meeting with the intent of talking about each other's lives, rather than work. Be careful about how many people are invited to these types of events—smaller groups will allow for each participant to fully engage.

Informal conversations needn't be only part of stand-alone events—leaders can consider dedicating the first few minutes of team check-ins for non-work-related dialogue, for example.

# Summary

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Every business is different, so there isn't one right way to best lead remote teams. Create practices that work best for your organization and are accommodating to remote and non-remote employees alike. Contact Taggart Insurance for additional resources regarding best practices for utilizing the remote workspace.

This guide is intended as a general overview and is not a substitute for legal advice. For more information on how to effectively use the virtual workspace or any of the business topics within this toolkit, contact Taggart Insurance.

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# Appendix

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Effectively leading remote teams is a challenge that requires many considerations. Leaders must be able to support each employee while effectively creating a dynamic in which a team can thrive. This Appendix contains a selection of resources designed to help your organization plan for best use of the remote workplace. It features checklists, virtual policies and essential forms.

Speak with Taggart Insurance if you have any questions about these resources. Note that some sections may require customization.

## Printing Help

There are many printable resources in this Appendix. Please follow the instructions below if you need help printing individual pages.

1. Choose the “Print” option from the “File” menu.
2. Under the “Settings” option, click on the arrow next to “Print All Pages” to access the drop-down menu. Select “Custom Print” and enter the page number range you would like to print, or enter the page number range you would like to print in the “Pages” box.
3. Click “Print.” For more information, please visit the Microsoft Word [printing support page](#).

## Remote Onboarding Checklist

### BEFORE THE EMPLOYEE'S START DATE

#### Job Duties and Schedule

- Contact the employee with useful information that may include any of the following:
  - Information about whether part or all of the orientation will take place remotely or at a specific location
  - Confirmation of the start date, time, place, parking, maps and dress code
  - Name of his or her mentor, if applicable
  - Request to complete new-hire paperwork, Form I-9, tax forms, direct deposit form and emergency contact information
- Add regularly scheduled meetings to the employee's calendar.
- Plan the employee's first orientation, training and assignments.

#### Social

- Email the employee's department with relevant information about their new team member, such as his or her start date, role and a brief bio. Copy the new employee, if appropriate.
- Select and meet with the new hire's mentor, if applicable. Provide suggestions and tips.
- Set up meetings with critical people for the employee's first few weeks.

#### Work Environment and Technology

- Plan for the employee's remote workstation.
- Communicate technology expectations of the employee ahead of their start date.
- Order any necessary training materials.
- Order business cards if necessary.
- Order equipment and plan for necessary software.
- Arrange for access to common shared network drives.
- Add the employee to relevant email distribution lists.
- Arrange for employee phone service and/or phone plan.

#### Training & Development

- Arrange pertinent training required for the job.

### FIRST DAY

#### Job Duties and Schedule

- Introduce the employee to the virtual workspace.
- Review outline of duties and expectations for the first week.

- Review hours of work. Explain policies and procedures for overtime, use of vacation, sick time and holidays.

### Social

- Be available to greet the employee on the first day, either in-person or via video chat.
- Introduce the employee to others in the workplace and his or her mentor.

### Employee Intranet and Tools

- Give the employee a key or building access card.
- Give the employee a tour of employee intranet and key tools.
- Explain how to get IT support.

### Technology

- Provide information on setting up voicemail and their computer.
- Ensure that the employee has a fully functioning workstation.

## FIRST WEEK

### Job Duties and Schedule

- Give the employee his or her initial assignment—something small and doable.
- Briefly check in with the employee each day to address any questions or concerns that may arise.
- Explain the annual performance review and goal-setting process.
- Review the process related to the probationary period, if applicable.

## FIRST 3 MONTHS

### Job Duties and Schedule

- Conduct regularly occurring one-on-one meetings while giving timely, useful feedback.
- Meet for an informal three-month performance check-in.
- Create written performance goals and professional development goals.

### Social

- Meet with the employee's mentor to review initial stages of mentorship and answer questions.
- Make sure that the employee is a part of ongoing conference or video calls on a regular basis.

### Training and Development

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- Ensure the employee has attended all scheduled training and is signed up for any future training sessions that may be needed.
- Provide information about continued learning opportunities, if applicable.

### ***FIRST 6 MONTHS***

#### **Job Duties and Schedule**

- Conduct a six-month performance review.
- Review progress on performance goals and professional development goals.

### ***FIRST YEAR (BETWEEN 6 AND 12 MONTHS)***

#### **Job Duties and Schedule**

- Celebrate successes and recognition of the employee's contributions.
- Continue providing regular informal feedback; provide formal feedback during the annual review process.
- Have a conversation with the employee about his or her experience to date.
- Discuss potential goals for the next year.

#### **Training and Development**

- Discuss the employee's professional development goals and identify relevant learning opportunities.

## *Virtual Interview Preparation Action Items*

Use this checklist to help you prepare for the hiring and interview process for an open position.

- Review federal, state and local laws related to employment and hiring practices.
- Write the job description and decide on any other necessary details, such as salary range and hiring manager.
- Decide who will conduct the screening interview and what basic qualifications must be met by candidates.
- Choose what type of interview you will conduct (e.g., over the phone or over video).
- Choose what video tool or platform you will be using if conducting video interviews.
- Decide how structured your interview will be. Do you want to work through a list of questions, or are you comfortable with a more casual, conversational approach?
- Write your interview questions. Decide if you will use one type (e.g., behavioral), or a mix of different types of questions.
- Know what questions are illegal.
- Establish a method of evaluation so you can fairly compare candidates.

## Telecommuting Policy

### Purpose

This policy establishes the guidelines will use to select and manage those employees approved to telecommute.

### Scope

This policy applies to all employees authorized to work remotely as a primary job function. It does not include those who are temporarily allowed by their manager to work from home or another location on an irregular basis due to extenuating circumstances.

### Definitions

Telecommuting is defined as working from at home or another off-site location, using electronic communication methods such as the internet to connect with the primary place of employment.

### Criteria for Selection

always strives to provide equal opportunities to all employees when it comes to working situations. However, telecommuting is not conducive to every employee and position. Keeping this in mind, will review all reasonable employee requests to telecommute using the following criteria:

- Is the employee a good candidate for telecommuting?
  - Dependable
  - Flexible
  - Proven performance
  - No record of disciplinary action
  - Comprehensive knowledge of position
- Can the duties of their position be successfully fulfilled through telecommuting?
  - Measurable work activities
  - Little need for face-to-face interaction with co-workers
  - Clearly established goals and objectives
  - Duties can be performed alone
  - Limited equipment is needed and can be easily stored at the off-site location

Note: The management of reserves the right to deny or revoke telecommuting privileges at their own discretion.

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## Responsibilities

Position requirements and responsibilities will not change due to telecommuting. Workers face the same expectations in relation to professionalism, work output and customer service, regardless of where their work is being performed. The amount of time an employee is expected to work in a given week will not change, although the exact scheduling of allotted hours will be left up to the discretion of their direct supervisor(s). If an employee's physical presence is required at 's primary work location, they are expected to report once given adequate notice.

## Contact With Primary Location

Employees approved for telecommuting are responsible for maintaining regular contact with their supervisor(s). The supervisor(s) will act as the employee's primary contact at . Both the employee and their supervisor(s) are expected to work together to keep each other informed of any developments that occur during the workday.

Employees must have approval from their supervisor(s) to:

- Alter their defined work schedule.
- Move company equipment to a new location.
- Transfer primary off-site operations to a new location.

## Off-site Work Areas

has a legal responsibility to provide liability coverage to its employees. Such legal responsibilities extend only to authorized, off-site work locations during scheduled work time. is responsible only for damages that result directly from official job duties. also accepts no responsibility for employees' personal property.

As could foreseeably be held responsible for an injury befalling an employee in their off-site work area, reserves the right to inspect off-site locations for safety concerns. Such an inspection will always be planned in advance for a time convenient for both the inspector and the employee.

If employees have domestic responsibilities they must attend to during scheduled working hours, they are expected to do so in a reasonable manner that will still allow them to successfully fulfill their job duties.

### **Printed**

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## Off-site Security

While employees in positions that regularly deal with highly sensitive information may not be ideal work-from-home candidates, such employees may be allowed to telecommute under certain circumstances. In these situations, it is up to the employee to enforce a rigorous standard for ensuring the security of all sensitive information they are entrusted with. Failure to do so will result in loss of telecommuting privileges.

## Expenses

Working primarily off-site could result in expenses not directly addressed by this policy. If such expenses are necessary for their official duties as prescribed, will reimburse the employees. However, since reimbursement is subject to management approval and is not guaranteed, potential expenditures should always be approved prior to any transactions being made.

## Equipment

Employees approved for telecommuting will be supplied by with the equipment required to perform their duties. It must be kept in mind that:

- All equipment purchased by remains the property of . All equipment is expected to be returned in a timely fashion should the employee cease telecommuting operations for any reason.
- Hardware is only to be modified or serviced by parties approved by .
- Software provided by is to be used only for its intended purpose and should not be duplicated without consent.
- Any equipment provided by for off-site use is intended for legitimate business use only.
- All hardware and software should be secured against unauthorized access.

## Remote Anti-harassment Policy

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is committed to providing a workplace free from discrimination, harassment and retaliation. Note that “workplace” is not limited to a physical location an employee is assigned to perform his or her duties. But rather, such prohibited actions extend to conduct that occurs remotely via electronic means.

will not tolerate harassment of any type based on race, color, religion, sex (including pregnancy), national origin, age (40 or older), disability, or genetic information and other characteristics protected under state, federal or local laws. Such conduct in any form is prohibited in the workplace (including places of remote or virtual work), at work-related functions or outside of work if it affects employees in the workplace. This policy applies to all employees, clients, customers, guests, vendors and persons with whom does business.

All employees must ensure they understand this policy and their obligations. Whether an employee’s conduct violates this policy will be based on how an employee’s conduct is received and whether a reasonable person would find the conduct to be in violation of the policy.

Harassment is defined as unwelcome conduct that is based on race, color, religion, sex (including pregnancy), national origin, age (40 or older), disability or genetic information. Harassment becomes unlawful where:

- Enduring the offensive conduct becomes a condition of continued employment; or
- The conduct is severe or pervasive enough to create a work environment that a reasonable person would consider intimidating, hostile or abusive.

Anti-discrimination laws also prohibit harassment against individuals in retaliation for filing discrimination charges, testifying or participating in investigations, proceedings or lawsuits under these laws, or, for opposing employment practices that they reasonably believe discriminate against individuals, in violation of these laws.

Petty slights, annoyances and isolated incidents (unless extremely serious) will not rise to the level of illegality. To be unlawful, the conduct must create a work environment that would be intimidating, hostile or offensive to reasonable people.

Offensive conduct may include, but is not limited to, offensive jokes, slurs, epithets or name-calling, physical assaults or threats, intimidation, ridicule or mockery, insults or put-downs, offensive objects or pictures, and interference with work performance. Harassment can occur in a variety of circumstances, including, but not limited to, the following:

- The harasser can be the victim's supervisor, a supervisor in another area, an agent of the employer, a co-worker or a nonemployee.
- The victim does not have to be the person harassed, but can be anyone who is affected by the offensive conduct.
- Unlawful harassment may occur without economic injury to, or discharge of, the victim.

Appropriate performance reviews, counseling or discipline by your manager do not constitute harassment.

If you feel that you are being harassed, you should take the following steps:

- Tell the harasser that his or her actions are not welcome and that they must stop, if you feel comfortable enough to do so.
- Report the incident immediately to your manager or human resources representative.
- Report any additional incidents or retaliation that may occur to your manager or human resources representative.

All reports will be investigated immediately and thoroughly. Complaints and actions taken to resolve complaints will be handled as confidentially as possible. Appropriate actions will be taken to stop and remedy such conduct, including interim measures during a period of investigation.

Retaliating or discriminating against an employee who reports a suspected incident of harassment or who cooperates in an investigation is prohibited. Employees who violate this policy or retaliate against an employee in any way will be subject to disciplinary action, up to and including termination.

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## Telecommuting Authorization

Name of Employee: \_\_\_\_\_

Position: \_\_\_\_\_

Home Address: \_\_\_\_\_

Best number to reach you when telecommuting (circle best number):

Home \_\_\_\_\_ Mobile \_\_\_\_\_ Work Phone \_\_\_\_\_

You are authorized to telecommute with the following schedule:

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
7:00 a.m.						
8:00 a.m.						
9:00 a.m.						
10:00 a.m.						
11:00 a.m.						
12:00 p.m.						
1:00 p.m.						
2:00 p.m.						
3:00 p.m.						
4:00 p.m.						
5:00 p.m.						
6:00 p.m.						
7:00 p.m.						

*The Company reserves the right to modify this schedule or terminate your telecommuting at any time. You may request a modification of your schedule or end telecommuting at any time with Company approval.*

is required to oversee employee safety and to comply with federal, state, and local labor and employment laws for employees who telecommute as well as those who work in the office. You must, therefore, comply with all company policies and directives regarding your home

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workplace. In addition, you must permit the Company to inspect your home workplace from time to time upon request.

From time to time, you may be required to work in the office during a period when you would normally telecommute.

You are responsible for working during the designated telecommuting hours, and you should therefore be available to your supervisor, colleagues, clients or customers, and others during your telecommuting periods. Nonexempt employees may not work overtime without written authorization from their supervisors.

The following equipment will be provided by the Company:

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Company equipment installed in your home is to be used only for work purposes. You are responsible for any damage to Company property caused by negligence or circumstances within your home (e.g., children and pets). You are required to return all Company equipment promptly upon request. You are responsible for the maintenance and repair of any personal property used for your work.

You must report to your supervisor or other designated person if you are ill, if equipment or power fails, or if for any other reason you will not be working during a designated telecommuting period.

You are subject to all Company rules and policies as described in the employee handbook.

I accept the foregoing terms and conditions for telecommuting.

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Employee's Signature

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Date

***Approved By:***

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Supervisor's Signature

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# CHECKLIST | REMOTE WORKSTATION

Presented by Taggart Insurance

As remote work has been an expanded practice, many organizations are reviewing how they can best support and plan for use of the remote workplace. Employers can use this checklist when reviewing and planning a remote workstation setup for current employees, or when planning a remote onboarding process. Remote workstation setup can vary by organization, and the employee's role and responsibilities. Employers can review this checklist to determine which components of a remote workstation should be provided to employees and what technology considerations should be planned for.

Workstation Environment and Setup	
Adequate space within the employee's home for an office	<input type="checkbox"/>
Workstation area that complies with ergonomic and safety guidelines	<input type="checkbox"/>
Workstation in a location with broadband network able to download and upload at a minimum of 1.5 megabits per second	<input type="checkbox"/>
Environment with minimal noise and distractions	<input type="checkbox"/>
Desk or work area with sufficient space for equipment	<input type="checkbox"/>
Comfortable and ergonomic office chair	<input type="checkbox"/>

Computer	
Desktop or laptop, either provided by the employer or employee	<input type="checkbox"/>
Adequate hard drive capacity and memory on computer to perform necessary job duties	<input type="checkbox"/>
If video calls will be part of the employee's job responsibilities, computer includes a webcam	<input type="checkbox"/>
Headset with microphone	<input type="checkbox"/>
Power cord	<input type="checkbox"/>
Mouse	<input type="checkbox"/>
Mouse pad	<input type="checkbox"/>
Keyboard	<input type="checkbox"/>

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# CHECKLIST | REMOTE WORKSTATION

Presented by Taggart Insurance

**CHECKLIST** REMOTE WORKSTATION

<b>Optional Workstation Equipment</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
Docking station or hub	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
External monitor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional monitor for dual-monitor setup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
External keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Printer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fax machine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Office Supplies</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
Notebooks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Binders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Paper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pencils	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stapler	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Technology Software and Services</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
Cloud-based phone subscription service or cellphone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Virtual private network (VPN) established for employee's computer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internal network access given to employee for all necessary job functions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Use this checklist as a guide when planning the remote workstation setup for employees working remotely full- or part-time at your organization. For assistance with remote work planning, contact Taggart Insurance.

# CHECKLIST

Presented by Taggart Insurance

# POST-CORONAVIRUS REMOTE WORK PLANNING

The coronavirus disease (COVID-19) pandemic has changed many aspects of the current workplace. As organizations create post-coronavirus return-to-work plans, many employers are reviewing remote work practices. Employers can use this checklist when implementing remote work.

Remote Work Planning	YES	NO
Has your organization considered the feasibility of remote work in your workplace?	<input type="checkbox"/>	<input type="checkbox"/>
Has your organization considered interviewing candidates virtually?	<input type="checkbox"/>	<input type="checkbox"/>
Has a process for onboarding remote employees been established?	<input type="checkbox"/>	<input type="checkbox"/>
Have remote work expectations been established for when employees return to work?	<input type="checkbox"/>	<input type="checkbox"/>
Have return-to-work expectations been communicated to employees?	<input type="checkbox"/>	<input type="checkbox"/>

Schedule	YES	NO
Does your organization have set guidelines for working hours?	<input type="checkbox"/>	<input type="checkbox"/>
Have guidelines for working hours been communicated to employees?	<input type="checkbox"/>	<input type="checkbox"/>
Are scheduling expectations detailed in your telecommuting policy?	<input type="checkbox"/>	<input type="checkbox"/>
Does your organization have a plan to monitor when employees are online?	<input type="checkbox"/>	<input type="checkbox"/>
Are employees required to check in when they're working remotely?	<input type="checkbox"/>	<input type="checkbox"/>
Does your organization have a plan in place to accommodate employees who may be balancing caregiving and working-from-home responsibilities?	<input type="checkbox"/>	<input type="checkbox"/>

Policies	YES	NO
Does your organization have a telecommuting policy?	<input type="checkbox"/>	<input type="checkbox"/>
Does your policy include information about expected working hours?	<input type="checkbox"/>	<input type="checkbox"/>
Does your policy include information about communication expectations?	<input type="checkbox"/>	<input type="checkbox"/>

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**CHECKLIST** | POST-CORONAVIRUS REMOTE WORK PLANNING

Does your policy include information about your company's cyber security expectations?	<input type="checkbox"/>	<input type="checkbox"/>
Does your policy include information about your company's expectations for using company property at home?	<input type="checkbox"/>	<input type="checkbox"/>
Does your policy include information about productivity expectations?	<input type="checkbox"/>	<input type="checkbox"/>
Have employees received your telecommuting policy?	<input type="checkbox"/>	<input type="checkbox"/>
Does your organization require employees to sign a policy acknowledgment agreement?	<input type="checkbox"/>	<input type="checkbox"/>
Has your employee handbook been updated with specific guidelines for remote work?	<input type="checkbox"/>	<input type="checkbox"/>

<b>Technology</b>	<b>YES</b>	<b>NO</b>
Do your remote employees have access to all the technology they need?	<input type="checkbox"/>	<input type="checkbox"/>
Does your company have access to video conferencing technology?	<input type="checkbox"/>	<input type="checkbox"/>
Does your company have access to communication platforms?	<input type="checkbox"/>	<input type="checkbox"/>
Does your organization have a plan in place for what employees should do if they have issues with their technology?	<input type="checkbox"/>	<input type="checkbox"/>
Are employees allowed to request additional equipment should they need it?	<input type="checkbox"/>	<input type="checkbox"/>
Are technology specifications detailed in your telecommuting policy?	<input type="checkbox"/>	<input type="checkbox"/>

<b>Communication</b>	<b>YES</b>	<b>NO</b>
Does your organization have a plan for regular communication with remote employees?	<input type="checkbox"/>	<input type="checkbox"/>
Is your communication plan detailed in your company's telecommuting policy?	<input type="checkbox"/>	<input type="checkbox"/>
Are managers checking in with employees daily?	<input type="checkbox"/>	<input type="checkbox"/>
Are plans in place for fostering teamwide communication?	<input type="checkbox"/>	<input type="checkbox"/>
Has your organization provided resources to employees on work-from-home ergonomics?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Does your communication plan include providing companywide news regarding the COVID-19 pandemic?	<input type="checkbox"/>	<input type="checkbox"/>

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Employee Engagement	YES	NO
Does your organization have a plan for keeping remote employees engaged?	<input type="checkbox"/>	<input type="checkbox"/>
Does your organization have an employee recognition program for remote employees?	<input type="checkbox"/>	<input type="checkbox"/>
Does your organization encourage employees to preserve their work-life balance?	<input type="checkbox"/>	<input type="checkbox"/>
Do managers check in on employees' mental well-being?	<input type="checkbox"/>	<input type="checkbox"/>
Are strategies in place to ensure employees don't feel isolated?	<input type="checkbox"/>	<input type="checkbox"/>
Do employees have access to telecommuting resources?	<input type="checkbox"/>	<input type="checkbox"/>
Are social engagement opportunities provided to remote employees, such as video calls intended for non-work conversations and team-building?	<input type="checkbox"/>	<input type="checkbox"/>

Use this checklist as a guide for remote work considerations when creating return-to-work plans. For additional resources on COVID-19, contact Taggart Insurance.