



Oregon Health Authority

OHA REMOTE WORK GUIDE

AGENCY GUIDE FOR ASSESSING REMOTE WORK ELIGIBILITY

JANUARY 2021

EXECUTIVE SUMMARY

The Oregon Health Authority is at the forefront of lowering and containing costs, improving quality and increasing access to health care in order to improve the lifelong health of Oregonians. Health equity is the chief goal for the agency. We pride ourselves in introducing new and novel ways of thinking about problems and doing the work of the agency. A flexible and efficient workforce is a critical factor in the success of our agency. To this end leadership proposes rethinking the way we see remote workplace arrangements. The goal of the OHA Remote Work Guide is to help managers see the workplace, and the environment where the work of the organization happens, in a new way. This new framework is intended to help OHA develop a more agile workforce and leverage the tangible benefits that remote work can bring to the agency and the Oregonians we serve. The guide is not intended to supplant the managers responsibility, accountability, or discretion to determine the methods, means, and personnel by which operations are to be conducted. Nevertheless, this reexamination of a fundamental component of organizational culture will require OHA management to reconsider the way they see the tasks and duties that are performed by their staff. It encourages managers to reconsider whether physical presence in the workplace is required to effectively perform the duties of the positions that directly report to them; and most importantly, to understand that for remote work to be successful "It is critical that the organizational culture not simply accept the value or importance of telecommuting, but actively and enthusiastically promote it."¹

SCOPE

The scope of this guide is limited to providing supervisory management with a framework to begin the process of analyzing the work of positions that directly report to them. The goal of the guide is for the supervisory managers to determine the portability of job duties and whether those duties require "physical presence" in the employer's traditional workplace for the effective performance of the position's functions and responsibilities. Additionally, it will help managers understand the characteristics that a remote worker should possess to ensure the feasibility and success of remote work arrangements.

WHAT THIS GUIDE DOES NOT PROVIDE

This guide is not intended to help with:

- Remote worker engagement
- Remote worker performance management
- Position reclassification
- Organizational design and span of control issues
- Remote work arrangements as a reasonable accommodation under the ADA
- Employee work schedules

WHAT THIS GUIDE PROVIDES

This guide is intended to give managers an objective framework for assessing the duties of a position to determine if those duties require "physical presence" in the traditional office and to offer an

¹ Khaifa M, Davidson R. "Exploring the Telecommuting Paradox." Communications of the ACM. March 2000;43(3):29-31.

understanding of the various personal characteristics and attributes that lead to successful remote worker arrangements .

THE ANALYTICAL FRAMEWORK TO ASSESS REMOTE WORK ELIGIBILITY

To transition OHA's organizational culture to one that values and leverages the benefits of remote work arrangements, we need to shift away from the mindset that sees remote work as a privilege and places the burden on the employee to prove their suitability as a remote worker. The imperative now is to refocus and apply a more objective lens to determine whether a position's duties and responsibilities may be portable.

It is important to understand that determining the portability of work is not equivalent to determining a position's "essential functions" under an ADA framework. A function can be determined to be "essential" under the ADA framework, yet at the same time be either remote work eligible (portable) or not. The ADA accommodation process is a person-centered process that is interactive and can occur whether the employee works remotely or in the employer's traditional workplace. This guide has a different focus and is intended to establish a new framework for OHA leadership by introducing the concept of "physical presence" to aid the manager in assessing the portability of duties to ensure the success of the remote work arrangement. Nevertheless, this new analytical framework will help the supervising manager more easily identify functions that may be deemed "essential" under the ADA framework.

THINGS TO THINK ABOUT BEFORE BEGINNING AN ANALYSIS

- Does the position primarily engage in "knowledge work"²?
- Is there an understanding of why the position duties are needed in the context of the program³ mission or the auxiliary support role⁴ (ASR) function performed?
- Does the position have a current position description? (*if there is an incumbent has the position been updated within the last year?*)
- Are the position's duties bound by defined performance standards or time sensitive deliverables?
- Does the position address "spur-of-the moment" unexpected problems for critical infrastructure requiring physical presence?
- Does the position address "spur-of-the moment" customer or client services that require face-to-face interaction?
- Are the duties of the position performed to support a single process or multiple processes during a defined work period that require a physical hand-off? (i.e., process interdependence)

² Knowledge work has been characterized as work that "...essentially consists of the organization of information artifacts, their creation, consideration, and transformation. The work process is dominated by communication, data production, and consumption actions: sending and processing e-mails, web browsing, working on documents, or doing calculations." Reinhardt, W.; Schmidt, B.; Sloep, P.; Drachsler, H. (2011). "Knowledge Worker Roles and Actions – Results of Two Empirical Studies". Knowledge and Process Management.

³ A program is defined by the Department of Administrative Services as "an on-going agency function that has a clearly identifiable statutory and budget authority"

⁴ Auxiliary support roles are those organizational functions that support the programmatic ones at the section level (e.g., Accounting, Procurement, Human Resources, Facilities), or at the unit level (e.g., office support)

- Does the position have access to sensitive or confidential data (HIPPA, LEDS, OJIN, etc.) that cannot be controlled outside a state-controlled office setting?
- Does the position need to access “legacy” or proprietary systems that cannot be reasonably accessed from a remote location?
- Does the position receive or issue physical products that currently, or for the foreseeable future, cannot be received, issued, or provided through the digital environment?
- Does the physical work have to be performed in a controlled or regulated environment?
- Does the position currently, or for the foreseeable future, engage with customers and clients in a manner that requires the employee to do so in the employer’s physical work location, or at the customer or client’s physical business or home location?
- Is the position required to use business equipment or machinery that cannot be duplicated or transferred to the remote environment, either currently or for the foreseeable future?
- Does the work require frequent, complex communication among group members, with short feedback loops and multiple streams of information that cannot be effectively maintained in a remote work environment, even with changes to technology, management and accountability?
- Is the position required to alter, change, or control the physical environment of the employer, the physical environment of the customer or client, or the person of the customer or client?
- Do the physical actions that are required by the position to move through a process or issue a deliverable require direct “in-the-moment” oversight or assistance by another employee (supervisory or non-supervisory)? (i.e., employee interdependence)

THE “PHYSICAL PRESENCE” CONCEPT

In the past, the typical business model led us to believe that “most jobs require the kind of teamwork, personal interaction, and supervision that simply cannot be had in a home office situation”, and that most work just “...simply cannot be performed off site.”⁵ The rise and development of information and communication technology (ICT) has changed how, when and where work can be effectively performed. ICT now allows us to expand our understanding about where the work of the organization can happen.

The “physical presence” concept and advancements in ICT will help us make the organization’s workforce more agile. Physical presence analysis will help supervisory managers assess the portability of duties in the process of objectively establishing remote work eligibility. Applying this analytical framework will instruct supervisory managers in determining the portability of work. This new framework begins with the supervisory manager asking, do the position’s duties require physical presence in the employer’s worksite for effective performance?

REMOTE WORK AND THE POSITION DESCRIPTION

REMOTE WORK FEASIBILITY BEGINS WITH A WELL WRITTEN POSITION DESCRIPTION

Remote work feasibility begins with a well written position description (PD). The PD is the primary document of personnel administration in the State of Oregon. Some of the major job factors covered by the PD include:

⁵ By “come to work” the court implied the traditional office setting. EEOC v. Ford Motor Co., No. 12-2484 (6th Cir. Apr. 22, 2014)

- Job design
- Job classification
- Statutory service assignment
- EEOC regulatory compliance
- Essential/marginal duties identification for ADA purposes
- Job exemption/non-exemption from the Fair Labor Standards Act (FLSA)
- Working conditions
- Work contacts (e.g., clients, patients, residents, etc.)

A fundamental purpose of the PD is to describe the specific work assigned to a position. A properly written PD will clearly state the tasks, authority and responsibilities that make up the job and will aid managers in identifying those position duties and responsibilities that may not require physical presence.

THE SUPERVISING MANAGER

An integral part of the supervising manager’s responsibility is to define and describe the work that is to be performed for the agency’s program or auxiliary support function. A well-crafted PD should lead to a mutual understanding between the supervisory manager and the incumbent of what is expected for achieving success in the position. It is essential that the supervising (direct-line) manager, whether in determining a new position’s tasks and responsibilities, or in reviewing an existing position’s tasks and responsibilities, be the one to establish whether the duties and responsibilities of the position are “portable” and may be performed under a remote work arrangement.

POSITION DESCRIPTION FORMAT

The State of Oregon uses a standard form (PD 122) for employee position descriptions. The PD includes 12 sections that address the various interrelated aspects of the job. These sections include:

1. Position Information (sections a thru m)
2. Program and position information (sections a and b)
3. Description of duties
4. Working conditions
5. Guidelines (sections a and b)
6. Work contacts
7. Position-related decision making
8. Review of work
9. Oversight functions (sections a and b)
10. Additional position-related information
11. Organizational chart
12. Signatures

POSITION DESCRIPTION SECTIONS AND REMOTE WORK FEASIBILITY

The manager, in assessing remote work feasibility, should pay special attention to sections 2, 3, 4, 5, 6, and 10. These sections should include comprehensive information in relation to the purpose of the position relative to the program; a detailed description of tasks and responsibilities; the working conditions; the guidelines and information used; and which entities the position interacts with as part of the position’s duties.

SECTION 2 – PROGRAM DEFINITION

Section 2a of the PD requires that the supervisory manager describe which program or auxiliary support area the job duties and responsibilities are established for. The supervisory manager should outline how the program or auxiliary support area contributes to the purpose of the agency. Additionally, general information should be included about the program's size (number of employees, budget, etc.), the scope of impact (county-wide, statewide, etc.) and who, or what the program or auxiliary support section affects.

SECTION 2 – POSITION DEFINITION

Section 2b requires a brief summary of why the position exists in supporting the objectives of the program or auxiliary support area. Clarity is essential when describing the job at a high level. One or two sentences may suffice to establish the broad view of what the position's function is.

For example:

- a) This position provides office support for the engineers in the (X) unit or section, by setting up meetings, printing documents and reports, and keeping accurate records.
- b) This job directs and monitors the work of technical and professional employees in the (X) unit who collect and analyze (Y) samples to ensure compliance with public health rules and regulations.
- c) This job performs standard technical lab tests on body fluid samples such as urinalysis and blood counts.

SECTION 3 – DESCRIPTION OF DUTIES

Section 3 requires that the supervisory manager accurately describe the major or most important duties assigned to the position. It is the most crucial section and requires a thoughtful explanation of the duties to be performed. This section is essential for providing the incumbent a clear picture of what must be done to be successful in the position. The supervising manager needs to clearly outline those essential duties and activities that the position exists for, and if removed would fundamentally alter the position's purpose⁶. Additionally, the supervising manager should apply the "physical presence" analysis and include a list of the position duties that require physical presence in the employer's workplace.⁷ Once the duties are outlined, the supervising manager will have to determine the percentage of time that is typically spent on each duty or task.

There should be a logical flow between section 3 and sub-sections 2a and 2b of the PD. If the PD is being drafted for a supervisory position, make sure clear statements are used outlining all the elements of the supervisory duties and responsibilities that will be provided by the position.

In describing the duties of a position, the supervising manager needs to be specific. Each statement needs to begin with an action verb that describes the actual physical or mental activities that the position needs to perform and is accountable for. Ensure that the description of duties includes what the position does, how it is done, and what or whom is affected. Below are some examples that illustrate ways to describe position duties more effectively.

⁶ An accurate exposition of the duties may also aid the ADA's "interactive" process, in the event there is a request for an accommodation by an incumbent in the position.

⁷ An alteration to the current position description template may be needed to easily indicate which duties require "physical presence" (e.g., checkbox, etc.)

VAGUE	CLEAR
1) Assists in handling correspondence	Receives, opens, date stamps, sorts and routes incoming mail to appropriate staff for needed action.
2) Maintains grounds and landscaped areas	Mows and edges lawn with power equipment. Removes yard debris (lawn clippings, leaves, trash, etc.).
3) Manages records	Compares physical invoices with purchase orders for consistency and accuracy. Reviews physical purchase requisitions submitted by X for accuracy and gives them to Purchasing Agent for approval and signature.
4) Manages the office	Schedules support staff work assignments. Prioritizes work as needed. Reviews completed work for accuracy and timeliness. Conducts performance appraisals. Approves time off. Insures proper staffing levels.
5) Provides customer service	Issues emergency cash payments to clients. Reviews customer documents (ODL, SSN, etc.) to determine eligibility. Issues direct cash payments.

A well written list of duties may help the supervising manager more easily determine which duties may be portable and which may be not when assessing remote work eligibility.

SECTION 4 – WORKING CONDITIONS

This section typically is used to describe the work environment conditions that may pose physical or mental injuries and other risks that cannot be mitigated through training or safe work environment policies. However, the supervising manager may also use this section to provide additional detail on the type of equipment used that may restrict the portability of duties or a change to the typical environment the work traditionally occurs in.

Working conditions examples that may indicate remote work feasibility:

- This position involves frequent contact with executives, management, and financial staff. It requires working with a variety of people and situations, which may occasionally require the incumbent to exercise diplomacy. Occasionally travel to meetings and trainings are required. There can be frequent interruptions, demanding timeframes, and occasional overtime needed, especially during budget development and legislative sessions. The location of this position is in an office cubicle environment with significant use of a computer.
- The position may require periodic travel throughout the state. Incumbents may be required to use a state vehicle to conduct business; must have a valid driver's license and a good driving record or be able to provide an acceptable alternate method of transportation. At times, weekend and evening work will be necessary to meet customer demands and department deadlines. While performing the duties of this job, you will be in an open landscape environment and may be exposed to the sounds and activity of those working around you.

These conditions may be in high traffic areas with moderate to loud noises and frequent interruptions. This position requires the ability to work on multiple tasks simultaneously, sometimes within short time frames.

- The position's duties are performed in a typical office setting with significant use of computer and phone. Overtime may be required. The incumbent in the position is required to meet numerous short deadlines throughout the year. Works with a wide variety of people and situations, which may occasionally expose the employee to difficult situations requiring diplomacy.

Working conditions examples that may *not* indicate remote work feasibility:

- Tasks are performed in a controlled laboratory environment that includes analyzing a variety of primary cells (e.g., bone marrow cells, fibroblasts, hepatocytes, glial cells, smooth muscle cells etc.) using specialized equipment (cell counters, biosafety cabinets, nitrogen containers, sample retrieval box systems).
- The position works in in a warehouse environment and uses various industrial equipment (e.g., hand trucks, pallet jacks, forklifts, boom-lifts, etc.) to lift, navigate, and transport heavy packages and palleted materials through narrow spaces to place them on scaffolding. Requires moving products between truck-trailers and from truck-trailers to various warehouse areas. Requires the ability to lift 60lbs unaided and navigate industrial equipment over different types of terrain (e.g., dirt, concrete, gravel).
- The work occurs in a 10,000 sq. ft facility. The incumbent in this position may need to lift up-to 60lbs, bend frequently, stand long periods of time, navigate stairs and wet surfaces, experience varied temperatures, encounter strong odors and hazardous materials. Tasks require the use of various janitorial supplies (e.g., disinfectants, deodorizers, and cleaning supplies) that may be caustic and cause nausea. Duties require the use of various janitorial equipment such as vacuums, floor scrubbers, floor buffers, sweepers, etc.
- The position responds to clients in person and by phone and may occasionally be exposed to difficult situations requiring diplomacy and de-escalation strategies. Overtime may be required.
- Incumbent in the position will use specialized printing and copying equipment and technology in the creation of documents (e.g., posters, reports, pamphlets, etc.). Receives "spur-of-the moment" requests for services and products by phone, e-mail, and from in-person walk-in traffic requiring a quick turnaround. Circumstances may occasionally expose the employee to stressful situations requiring tact and the ability to de-escalate irate customers.
- Works in an office setting with significant use of computer and phone. Requires lifting boxes up to 40lbs and long periods of time standing and performing repetitive movements, such as opening heavy cabinet drawers, re-stocking office materials, filing documents, and opening mail.

SECTION 5 – GUIDELINES

Section 5 of the position description typically includes guidelines and information (e.g., State or Federal laws, regulations, policies, manuals, or desk procedures) that inform the incumbent on how, when and where certain deliverables and services are issued. Nevertheless, the supervising manager may use this section to outline those proprietary or legacy systems that contain protected data (LEDS, OJIN, HIPPA, Vital Statistics, Child and Elder abuse databases, etc.) needed by the incumbent to inform or guide their work, and which cannot otherwise be accessed outside a controlled environment; either because of policy, technological limitations, or agency agreements with the data provider.

Below are examples using third party systems that limit task portability:

- Uses the Law Enforcement Data Base system (LEDS) Oregon Justice Information System (OJIN) and related guidelines to process background checks.
- Uses the Oregon Employment Department’s wage records system (WAGE) to review client income when determining benefit eligibility.

SECTION 6 – WORK CONTACTS

Section 6 is used to identify people, or groups of people, outside the typical work unit with whom the employee has contact during the course of their normal work. Examples can be clients, inmates, patients, residents, legislators, federal employees, at either regional or national levels, agency or State employees, and people outside of State government. In addition, the supervising manager is required to outline how, why, and how often the contact occurs with those entities.

The chart below provides examples of entries that may or may not indicate eligibility for remote work.

Who Contacted	How	Purpose	How Often
Budget Administrator	In person, phone, electronically	Receive assignments, review ongoing tasks, review products	Daily
Legislative Fiscal Office (LFO) and Department of Administrative Services (DAS) Chief Financial Office (CFO)	In person, phone, electronically	Receive questions, respond to same, seek clarification, provide products	As needed; varies from daily to monthly
PEMG	In person, telephone, written	Review work product. Ensure timelines and quality control. Process improvement, Project status	Daily, Weekly, Monthly
Customers (Internal & External)	Face-to-face	Receive and issue documents and materials	Daily
Customers (External)	Face-to-face and by phone	Determine and issue benefits	Daily

SECTION 10 – ADDITIONAL JOB-RELATED INFORMATION

Section 10 provides an opportunity to add any additional job-related information that may have not been previously captured in the other sections of the PD. Items may include special requirements such as licensing, certification, registration, or permits required by law, rule, or regulation. Additionally, the supervising manager may outline what level of authority the position has in spending or encumbering money for staff, supplies, services, and equipment. There may other special skills required, such as a language that needs to be spoken or signed, that impacts the portability of duties and may limit or preclude remote work eligibility.

REMOTE WORK ELIGIBILITY

The “physical presence” analysis framework developed in the previous pages is intended to help the supervising manager identify the portability of the tasks and duties of a given position. However, it does not help us identify whether an employee and their particular home environment are well suited

for remote work. The Department of Administrative Services (DAS) has made a major effort to provide guidance and best practices⁸ to State agencies when addressing the “working remotely” issue and have issued a new policy⁹ and website¹⁰ that helps “reimagine” the work of state government. Furthermore, many State agencies have created *ad hoc* policies to meet the needs of their specific organizational cultures. In the following pages we intend to leverage the best of DAS and our own agency’s shift in remote work practices to create a more comprehensive framework that may help supervisory managers identify successful remote work arrangements.

We should be aware that remote work arrangements may require work realignment and entail a major lifestyle change for the employee as work encroaches on their home environment. Additionally, personality plays a major role in assessing whether an employee is properly suited for remote work. When considering whether an employee should shift to a permanent remote work location, whether full or part time, both the supervisor and employee should make sure they are aware of the personality traits and characteristics that will help determine the success of the remote worker.

SPEAKING HONESTLY ABOUT REMOTE WORK

When considering employees for remote work, managers should engage workers in an honest dialogue regarding the impact such a change may have on their well-being. Additionally, managers need to understand the “up-side” and “down-side” of remote work and familiarize themselves with the personal and environmental factors that are conducive to performance in a virtual work environment.

REMOTE WORK CONDITIONS

Supervisors considering changing an employee’s status to “remote” will want to provide clear expectations given that the parties “...may actually be starting with very different assumptions and desires.”¹¹ Agency managers should make employees aware that remote work agreements are generally voluntary, unless remote work is a requirement of the position. Supervising managers and employees should understand that remote work is neither an employee right nor an employee benefit; it is a management tool to augment organizational performance. Furthermore, managers should set clear expectations prohibiting non-authorized overtime and requiring that the remote worker take their breaks and lunches in a timely manner.

OVERTIME, BREAKS, AND LUNCHES

Many employees are attracted by the flexibility and freedom that remote work offers. However, there can be a risk and a downside to working remotely, both for an employee and an employer. Managers, as well as employees, must guard against an approach that sees remote work as occurring 24/7/365. Some managers may feel that employees should be available “on-demand”, which may alienate their staff and create a legal risk to the organization. Conversely, an employee who needs to meet

⁸ See the “DAS Telecommuting & Teleworking Guidelines & Practices”

⁹ DAS Statewide Policy 50.050.01 (Working Remotely) <https://www.oregon.gov/das/Policies/50-050-01.pdf>

¹⁰ “wORK reimaged” <https://www.oregon.gov/das/HR/Pages/wORK.aspx>

¹¹ Smith I.A., Baruch Y. “Telecommuting and the Legal Aspects” Telecommuting and virtual offices: issues and opportunities. 2001 1-27

performance standards or deliverables may feel obligated to work beyond their scheduled hours and not account for what has been called the "hidden' labor involved in flexible working"¹², as they try to meet unit goals or time sensitive deliverables.

Research indicates that although remote work can lead to increased performance, some performance increases may be due to employees taking fewer breaks and sick days.¹³ However, State and Federal law, as well as collective bargaining agreements govern the amount of time OHA employees may work before incurring overtime. Additionally, Oregon Administrative Rules¹⁴ direct how long an employee can work before they need to take breaks and lunches. These laws, rules, and labor agreements apply equally to those working remotely as to those working in the traditional office setting. Employers have a legal obligation to accurately track the hours of their remote workers and pay them for all hours they work. Managers need to ensure that they pay remote workers for any overtime worked and ensure that they take their breaks and lunches as outlined under applicable laws, rules, and collective bargaining agreements.

REMOTE WORK THE UPSIDE FOR EMPLOYEES

Current research indicates that remote work may increase performance,¹⁵ job satisfaction, and lower attrition¹⁶ due to employees experiencing a better "work-life"¹⁷ balance and other associated factors that accrue from remote work.

Some "upside" factors may include:

- Improved work-life balance
- Greater individual productivity¹⁸
- Increased "on-balance" employee remuneration (business attire, grooming, gas, vehicle wear-and-tear, less leave usage for incidental life activities-e.g., being there for a package, plumber, electrician, etc.)
- Reduces individual carbon footprint (e.g., lower gas usage)¹⁹
- Environmentally friendly (psychological benefit)

¹² Whittle A, Mueller F. "I could be dead for two weeks and my boss would never know : telework and the politics of representation" *New Technology, Work and Employment*. 2009 24(2): P.132

¹³ Bloom N, Liang J, Roberts J, Zhichun J. "Does Working from Home Work? Evidence from a Chinese Experiment," *The Quarterly Journal of Economics*, Oxford University Press 2015; vol. 130(1), page 165

¹⁴ See Oregon Administrative Rule, 839-020-0050

¹⁵ A Stanford University study of 996 Shanghai airfare and hotel call center employees found that the performance of home workers increased by 13% over 9 months. (Bloom N, Liang J, Roberts J, Zhichun J. "Does Working from Home Work? Evidence from a Chinese Experiment," *The Quarterly Journal of Economics*, Oxford University Press 2015; vol. 130(1), pages 165-218)

¹⁶ *Ibid.*, 212

¹⁷ Although there is research that shows that remote work may negatively impact work\life balance given that some "...employees' home responsibilities, such as childcare, make it difficult for them to perform their work-related duties...[causing]...a crowding out effect on work obligations." (Caillier J. *Do Work-Life Benefits Enhance the Work Attitudes of Employees? Findings from a Panel Study. Public Organization Review*. 2017;17(3):393-408.)

¹⁸ Kossek E.E. "Telecommuting; Flexible work arrangements; Work-family; Control; Work-life boundaries." *Journal of Vocational Behavior*, 68 (2006) 347-367 "...our results showed that formal use of the telework policy was significantly related to higher performance"

¹⁹ Kossek E.E. High Gas Prices: A Plus for Employers. <https://hbr.org/2008/07/high-gas-prices-a-plus-for-employers>. July, 2008. Accessed October 22, 2020.

- Higher job satisfaction and retention²⁰
- Increased personal safety (less time on the roads)
- Reduced sick leave usage
- Asynchronous business communication
- Increased autonomy
- Greater empowerment
- Allows for greater geographic personal mobility
- Office distraction control
- Disability friendly
- Introvert compatible

REMOTE WORK THE DOWNSIDE FOR EMPLOYEES

The health and wellness of our employees is of paramount importance to the organization. Therefore, it is incumbent upon supervising managers, considering employees for remote work, to ensure that employees are aware of some negative aspects that may impact their health and wellness.

Some “downside” factors may include:

- Lower advancement opportunity (*out of sight out of mind*)²¹
- Neglected breaks and lunches²²
- Reduced professional interpersonal relationship opportunities (*water cooler connections*)²³
- Less professional facetime²⁴
- Increased turnover²⁵
- Reduced immediate peer and managerial feedback²⁶

²⁰ Ibid.

²¹ "...some employees returned to the office to avoid what they perceived as a working from home promotion “discrimination” penalty." (Bloom N, Liang J, Roberts J, Zhichun J. "Does Working from Home Work? Evidence from a Chinese Experiment," The Quarterly Journal of Economics, Oxford University Press 2015; vol. 130(1), page 206

²² Ibid., Although there was a 13% increase in performance from those employees working from home, 9% of the increase was due to employees working more minutes of their shift due to taking fewer breaks and sick days.

²³ Caillier J. Do Work-Life Benefits Enhance the Work Attitudes of Employees? Findings from a Panel Study. Public Organization Review. 2017;17(3):404.

²⁴ Ibid.

²⁵ Golden, T. D. (2006). "The role of relationships in understanding telecommuter satisfaction". Journal of Organizational Behavior, 27, 319–340. Finding that “teleworking more than 2 days a week negatively affects employee attitudes...[and] actually enhance[s] employee intentions to leave the agency.” Note, some studies would seem to contradict these research findings. Owl Labs in collaboration with Global Workplace Analytics (GWA) recently surveyed 2,025 full-time workers in the United States between the ages 21 to 65 at companies with 10 or more employees. When asked what impact being able to work remotely some of the time would have on their intention to leave, 74% of employees answered that they “would be less likely to leave their employers” (“State of Remote Work : COVID Edition” OWL Labs, Global Workplace Analytic -survey data collected June-July 2020)

²⁶ Bloom N, Liang J, Roberts J, Zhichun J. "Does Working from Home Work? Evidence from a Chinese Experiment," The Quarterly Journal of Economics, Oxford University Press 2015; vol. 130(1), page 207. "...WFH (working from home) employees lack[ed] opportunities to develop the interpersonal skills to succeed in managerial jobs and therefore are less likely to be promoted."

- Personal and professional isolation, disaffection, and disconnection²⁷²⁸
- Impact to new employee integration and orientation into the organizational culture²⁹
- Sub-optimal decision making³⁰
- Communication lag and disruption³¹
- Negative effects on productivity³²³³
- Impact to creativity³⁴
- Impact to equity³⁵
- Role conflict³⁶
- Impact to meta-communication³⁷ (verbal and physical)
- Loss of a sense of being part of the greater OHA community
- Reduced spur-of-the-moment knowledge transmission opportunities
- Heightened conflict between traditional and remote workers
- Loss of wellness detection (e.g. domestic abuse, illness, depression)
- Extrovert incompatible

EMPLOYEE CHARACTERISTICS FOR DETERMINING REMOTE WORK SUCCESS

Below are some of the employee attributes that supervising managers should weigh as indicators that lead to success when considering employees for remote work.

²⁷ Whittle A, Mueller F. "I could be dead for two weeks and my boss would never know : telework and the politics of representation" *New Technology, Work and Employment*. 2009 24(2): 131:143

²⁸ Golden T, Veiga J, Dino R "The Impact of Professional Isolation on Teleworker Job Performance and Turnover Intentions: Does Time Spent Teleworking, Interacting Face-to-Face, or Having Access to Communication-Enhancing Technology Matter? *Journal of Applied Psychology*; 2008, Vol. 93, No. 6, 1412–1421

²⁹ *Ibid.*, 1413

³⁰ *Ibid.*, 1413

³¹ *Ibid.*, Citing Rook, 1984

³² Dutcher, G.E. "The effects of telecommuting on productivity: An experimental examination. The role of dull and creative tasks" *Journal of Economic Behavior & Organization* 84 (2012) 355– 363. Indicating there may can be a 6-to10 percent reduction in productivity for routine work/tasks.

³³ Dutcher G.E., Saral K.J. "The impact of beliefs on effort in telecommuting teams" *Working Papers in Economics and Statistics, University of Innsbruck*, 2014 "lower expectations of partner productivity resulted in lower effort when individuals were partnered with telecommuters."

³⁴ Mural.co conducted a world-wide poll of 275 designers and found that "only 15% of designers reported that working remotely improves their work." Additionally, Mural.co found that some of the biggest challenges experienced by designers was loss of spontaneity, lack of interpersonal relationships, and poor communication. (<https://www.mural.co/>)

³⁵ Fogarty H, Scott P, Williams S. "The half-empty office: dilemmas in managing locational flexibility" *New Technology, Work and Employment* 26(3): 183- 195 "Available evidence suggests considerable social unevenness in the distribution of teleworking and other flexible working opportunities..."

³⁶ Caillier J. Do Work-Life Benefits Enhance the Work Attitudes of Employees? Findings from a Panel Study. *Public Organization Review*. 2017;17(3):393-408.

³⁷ "Meta-communication is nonverbal communication that either supplements what is being said or indicates that what is being said is not what is meant. For example, if one person asks another person, "Who is crying?" or "What is wrong?" and that person replies that nothing is wrong, obviously, the message being sent does not agree with the spoken reply. Crying is typically indicative of something wrong." (<https://www.reference.com/world-view/meta-communication-one-example-e974ccbeed96bec2>)

Employee attributes

- Self-driven (autotelic) personality
- Autonomous (*i.e., not requiring onsite supervision by a manager or lead worker*)
- Adept at time management³⁸
- Organized
- Efficient
- Effective verbal and written communication
- Information and communication technology (ICT) aptitude and proficiency
- Collaborative
- Self-care and stress aware
- Able to manage work-life balance

Employee status

- Trial service completed
- Training completed
- Not in discipline

FACTORS FOR DETERMINING REMOTE WORK ENVIRONMENT ELIGIBILITY

Managers should advise employees of the importance of having a suitable and effective work environment at their remote location. Having the proper ICT (hardware, software, peripherals and infrastructure, etc.) and remote office set-up (furnishings, ergonomics, area, etc.) will be essential in ensuring productivity and reducing employee fatigue and frustration. The following are questions that supervisors may consider asking when assessing remote work eligibility.

ICT AND SECURITY QUESTIONS

- Does the remote location have network connectivity that meets agency standards?
- Does the remote location have cell service coverage that meets agency standards?
- Does the remote worker have all the necessary software and access to agency legacy systems needed to perform all their duties?
- Does the remote location satisfy all the relevant Agency and State policies regarding information control, safety, security, etc.?

HOME OFFICE FURNISHINGS, ERGONOMICS, AND OTHER CONSIDERATIONS

- Does the remote location have the necessary home office furnishings needed by the employee to perform the position's function effectively?
- Does the remote work setting, if at home, align well with the employee's domestic circumstances and living arrangements?
- If the worksite is outside of Oregon, has DAS Risk been contacted to determine workers compensation coverage?³⁹ Is OIS able to support the out-of-state technology needs?

³⁸ Baruch Y, "Teleworking: benefits and pitfalls as perceived by professionals and managers" *New Technology, Work and Employment*. 2000 15(1): 34-49

³⁹ A worksite outside of Oregon that will remain in force for a period longer than 14 workdays, requires the agency to contact DAS Risk Management to determine if out-of-state workers' compensation coverage is needed.

Managers should consult with OHA's Office of Information System for guidance on the proper ICT requirements, software and hardware availability and set up instructions. Additionally, OHA's Office of Human Resources is available to provide managers with guidance on agency support in procuring and setting up the home office environment.

When the manager and the employee have discussed all of the above benefits, drawbacks and requirements and there is reason to believe a remote work arrangement will lead to success, the manager and the employee can agree to a remote work schedule and the remote work process can be completed in Workday.

MANAGING THE DISTRIBUTED WORKFORCE...

Management has two specific tasks. The first is the creation of "...a true whole that is larger than the sum of its parts, a productive entity that turns out more than the sum of the resources put into it...the second ...is to harmonize in every decision and action the requirements of immediate and long-range future."⁴⁰ Management does this by organizing work for productivity and to produce results. Remote work provides new opportunities in managing the organization's staff for performance. However, a distributed workforce requires managers to adopt new ways of managing and leading in order to maximize worker success. Supervising managers need to have (or develop) the skills necessary to be effective when managing the virtual work environment. They need to be perceptive in order to safeguard their workforce against isolation, disconnection, disaffection and disengagement. Additionally, managers will need to trust⁴¹ their employees while at the same time ensuring employee accountability. The old modalities of organizational control will have to be replaced by new ways of engaging with employees to create worker, team and overall unit achievement.

Managers have a responsibility to understand the work and deliverables of the employees they supervise in the agency's programmatic and auxiliary support units. In addition, managers need to be cognizant of the degree of interdependence their organizational units or teams have to others in the agency in order to avoid role conflicts that may emerge during work execution, and to ensure effective collaboration.

MANAGING THE REMOTE UNIT

Supervisors need to recognize that for a work unit to be a "unit" their staff must be organizationally aware, cohesive, and connected. Absent in the virtual office are the typical organic factors that help transmit organizational best practice and ideas. Consequently, the supervising manager will need to become more perceptive in detecting process losses and lagging engagement. As the agency transitions to having more staff conduct work in the virtual environment, managers will need to understand the elements that contribute to a well-functioning distributed workforce. The meta-communication, inherent in employee communication, that was afforded by the traditional office space, will be absent in the virtual environment. Meta-communication has been an important factor for transferring knowledge, the organization's values, and in reinforcing the agency's mission.

⁴⁰ Drucker P. Management: Tasks, Responsibilities, Practices, New York: Harper & Row; 1974

⁴¹ Kossek E.E., Lautsch B.A., Eaton, S.C. "Telecommuting, control, and boundary management: Correlates of policy use and practice, job control, and work-family effectiveness" Journal of Vocational Behavior 68(2006) 347-367

To ensure remote worker success, the supervising manager will need to consider the following questions:

- Can you determine overall staff performance?⁴²
- Are you able to determine individual employee performance?
- Have you identified unit dependencies and interdependencies?
- Is your staff ICT proficient?
- Does your unit have the necessary ICT to be efficient in a virtual environment?
- Are you prepared to organize regular virtual meetings with staff and conduct genuine engagement check-in's with individual employees?
- Do you have a plan to foster a collaborative work environment in the virtual workspace?
- Do you have a strategy to create and maintain unit cohesion?
- How will you convey the mission and goals of the unit and overall organizational values (unit awareness)?
- Will you be able to create connection between unit employees?
- Have you established a framework for onboarding new employees?

MANAGING THE HYBRID UNIT

A hybrid unit is composed of staff who work remotely either full or part time and employees who work their full schedule in the traditional office setting. This hybrid staffing condition will require managers to adopt different strategies to ensure organizational awareness, cohesion, and connection is maintained between remote workers and traditional workspace staff. Managers will need to safeguard against resentments that may arise between employees remaining in the traditional office space, who may feel that remote workers are gaining additional benefits due to their ability to “work from home”. In contrast, the manager will have to be perceptive in detecting any antagonisms that may arise from remote workers that may feel working remotely may impact their career prospects⁴³. Supervisors should be quick to recognize when an “us against them” attitude begins to surface in their hybrid unit. Supervisors should work diligently to ensure that unit cohesion, connection, and comity is maintained between both types of employees.

Managers with full-time remote workers will need to be adept in detecting and addressing when professional isolation and disconnection begins to occur with individual staff⁴⁴. Supervisors may have to guard against the natural tendency that gives rise to an “out-of-sight-out-of-mind” disposition relative to their remote workers. This predisposition may impact a remote worker’s opportunity for professional advancement⁴⁵ and their access to immediate real-time organizational or unit data and information. Managers should also recognize that remote work may impact an employee’s ability to develop more meaningful and productive workplace relationships⁴⁶ that typically arise from interactions that happen in common office areas (e.g., break rooms, kitchen areas, cafeterias, etc.)

⁴² Managers should be cognizant that unit performance based on worker averages may mask lagging individual productivity and performance

⁴³ Whittle A, Mueller F. "I could be dead for two weeks and my boss would never know : telework and the politics of representation" *New Technology, Work and Employment*. 2009 24(2): 133

⁴⁴ Bloom N, Liang J, Roberts J, Zhichun J. "Does Working from Home Work? Evidence from a Chinese Experiment," *The Quarterly Journal of Economics*, Oxford University Press 2015; vol. 130(1), page 170.

⁴⁵ Ibid.

⁴⁶ Ibid.

In contrast, staff working full-time in the traditional workspace may experience their own concerns. The close physical proximity and quick accessibility of workers in the traditional office space may lead to additional tasks added to their normal workload. Additionally, they may have less awareness or have greater disconnection from the work that is produced by remote workers. Managers supervising dual-location staff will also have to determine the extent of ICT and office support that will be provided to their staff working two locations.

MANAGING THE REMOTE TEAM

Whether working virtually or in the traditional office, the most basic organizational grouping of employees intended for a performance outcome is the work unit. Work units may be subject to varying degrees of interdependence to achieve goals and deliverables. The greater the task or project interdependence the more conducive the grouping or unit may be toward becoming a team⁴⁷. Managers using the team framework in a virtual environment need to be aware of the elements that lead to successful collective work products. There are three basic characteristics that members of a team should possess, skill, accountability and commitment. Each of the three characteristics are composed of the following elements.

Skill

- Problem solving
- Subject matter proficiency
- Interpersonal communication
- ICT proficiency and aptitude

Accountability

- Mutual
- Individual

Commitment

- Specific goals
- Common approach
- Meaningful purpose

Once the remote team has been established then the supervising manager will need to ensure the team develops the necessary infrastructure to maximize team connection, cohesion, and collaboration.

MANAGING THE REMOTE WORKER

Whether the remote worker engages in knowledge-intensive tasks (e.g., decision-making, knowledge-production scenarios, and monitoring organizational performance) or routine information processing both types of workers operate with a certain degree of autonomy or control.⁴⁸ Nevertheless, many

⁴⁷ For a working definition we will use Katzenbach and Smith's, *The Wisdom of Teams*, definition, "A team is a small number of people with complementary skills who are committed to a common purpose, performance goals, and approach for which they hold themselves mutually accountable."

⁴⁸ "Control, the autonomy one has to make decisions about the order and way in which one's work is done..." Kosseck E.E., Lautsch B.A., Eaton, S.C. "Telecommuting, control, and boundary management: Correlates of policy use and practice, job control, and work-family effectiveness" *Journal of Vocational Behavior* 68(2006) 348

remote workers are part of units or teams. Therefore, collaboration is essential for efficient team performance. Supervising managers need to provide context to the needs of the individual in relation to the group. The following list contains some basic factors that need to be in place for effective management of the remote worker.

- Position performance measures
- A list of resources for the employees to use in the event of downtime
- A clear understanding of the work the employee needs to do
- A performance accountability strategy for:
 - Providing a clear understanding of deliverables and their timelines.
 - Achieving process gains or detecting and correcting for process losses.⁴⁹
 - Increasing individual productivity or address lagging productivity.
- A manager-staff “check-in” strategy.
- A strategy to detect and address lagging engagement.
- A strategy to identify struggles with team communication or collaboration.

CONCLUSION

The OHA Remote Work Guide is conceptual in nature. The guide is not intended to supplant the manager’s responsibility, accountability, or discretion to determine the methods, means, and personnel by which operations are to be conducted. Effective management requires balancing and harmonizing the major program and auxiliary support functions that impact agency employees and resources within the context of community and the larger society we serve. We recognize that managers must prioritize and strike a balance between the individual employee's desires, job performance, and the needs of the overall organization, division, section, unit, or team. Therefore, this guide should not be read as "policy". It is a framework for understanding the portability of tasks and responsibilities for the positions that do the important day-to-day work of our agency. Information and communication technology have shown us the possibilities of the portability of work. This guide allows for expanding the world of virtual work, not anchored to a physical location provided by the employer.

⁴⁹ Process Gains (PG) and Losses (PL) are two groups of parameters that determine a range of positive and negative results reached throughout implementation or upon completion of a process. PG includes all process achievements that reach success. In contrast, PL consists of process efforts and actions that have been failed and not achieved for some reason.