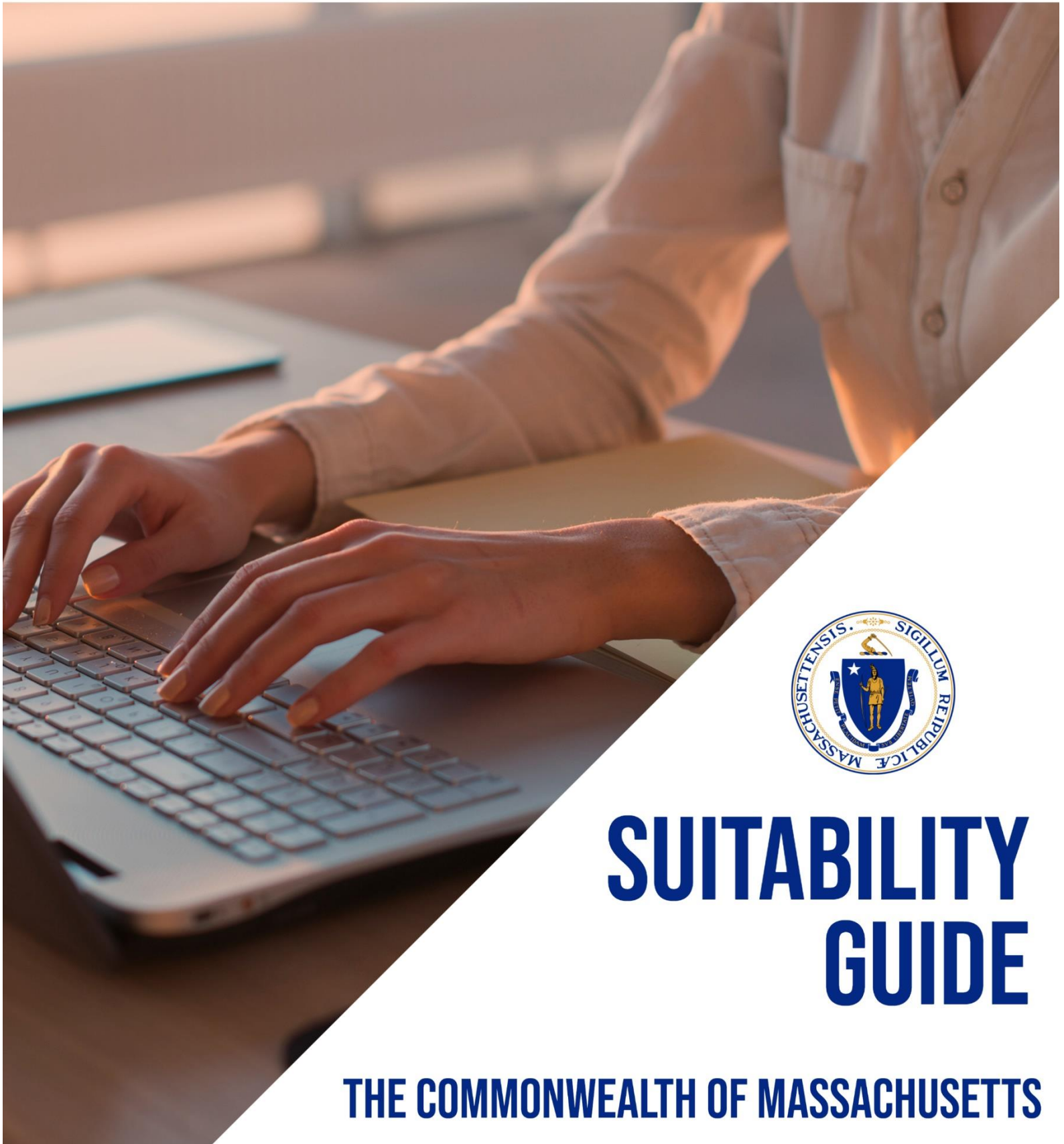


# TELEWORK



## SUITABILITY GUIDE

THE COMMONWEALTH OF MASSACHUSETTS

## Purpose

This document is intended to help agency leadership and management determine which roles and employees are well-suited for regular or occasional telework (i.e. on certain days of the week or under specific circumstances). Telework is defined as an alternative workplace arrangement which provides employees the opportunity to work at a place other than their regularly assigned work location.

Telework determinations can be made in two steps:

**Step 1:** Determine the suitability of positions based on assigned responsibilities

**Step 2:** Determine the suitability of employees based on past work performance

## Step 1: Determine which positions are conducive to telework

A position is conducive or suitable for telework when it has some responsibilities that can be performed away from the regular work location without impacting productivity, operational efficiency, customer service, and team collaboration.

When determining position suitability, ask:

***Can some or all of the tasks assigned to this role be performed outside of the office?***

If the answer is yes, the position may be suitable for some amount of telework.

Note that this determination is based on the type of work assigned to the role, not on the employee in the role.

Certain positions are generally conducive to telework because the primary functions of the role can be performed from a variety of locations, not just the primary work location (typically, an office). For example, the roles of counsel, data analyst and accountant may have job duties that would typically be considered suitable for telework because many of the tasks associated with those roles (e.g. legal analysis, data analysis, writing, budgeting, etc.) can be performed from a variety of physical locations.

Note that a position may be suitable for some amount of telework *even if some responsibilities must be done at the assigned work location*. For example, a role may require an employee to be present at the primary work location some of the time to interact with clients in person, but may also require the employee to set aside time to complete paperwork or write reports. Since the latter responsibilities may not need to be completed at the office, such a position may potentially be suitable for a limited amount of telework.

Conversely, you may choose to determine which roles are categorically *not* conducive to telework. Cooks, correction officers, firefighters, janitors, lifeguards, and truck drivers would generally have job duties incompatible with telework because these jobs mostly involve work that needs to be performed at the designated work location.

The table below shows a non-exhaustive list of tasks according to their typical suitability for telework:

Tasks that <u>may</u> be suitable for telework	Tasks that <u>are not</u> suitable for telework
<ul style="list-style-type: none"> <li>✓ Auditing</li> <li>✓ Budgeting</li> <li>✓ Data analysis</li> <li>✓ Editing</li> <li>✓ Programming</li> <li>✓ Project management</li> <li>✓ Research</li> <li>✓ Software development</li> <li>✓ Writing</li> </ul>	<ul style="list-style-type: none"> <li>✗ Building security</li> <li>✗ Construction</li> <li>✗ Direct care</li> <li>✗ Driving</li> <li>✗ Infrastructure repair</li> <li>✗ In-person customer service</li> <li>✗ In-person IT support</li> <li>✗ Physical inspections</li> <li>✗ Mechanical work</li> </ul>

Note that the preceding examples of potentially suitable and unsuitable roles and tasks are only illustrative and are non-exhaustive. Your agency may have other roles and tasks that are categorically eligible or ineligible for telework.

When discussing the suitability or unsuitability of positions for telework, consider explaining to employees why you made such determinations. Providing a rationale for your decisions can help limit any dissatisfaction that may result from these determinations.

## Step 2: Determine the suitability of specific employees who are interested in telework

For those positions that are compatible with telework based on their assigned responsibilities, you may then determine, on a case-by-case basis, whether specific employees in those roles are suitable for telework.

This determination is generally made by the employee's supervisor or manager. This same person would typically review any requests from direct reports to telework and approve or disapprove telework agreements.

Each employee should be provided an individualized review as to whether telework is appropriate. Among some of the factors that can be considered when assessing whether a particular employee should be approved or denied a telework arrangement are:

- ✓ The employee's most recent performance history (including disciplinary action), up to 24 months prior to the date of the request
- ✓ Whether the employee requires close supervision
- ✓ Whether the employee manages time well
- ✓ Whether the employee understands their role and expectations
- ✓ Whether the employee is organized, highly disciplined and conscientious
- ✓ Whether the employee is a self-starter
- ✓ Whether the employee consistently meets deadlines

Employees who are in their probationary period should not be approved for telework.

If you determine that an employee is not well suited to telework, consult your agency's telework program to follow the appropriate procedure for communicating the denial of the telework request. If the employee is a union member, you should also consult the relevant collective bargaining agreement to ensure compliance with any applicable procedures. For example, some agreements require that telework determinations be communicated in writing and that any reasons for disapproval be stated in writing as well.

Aside from being a requirement in certain cases, communicating the rationale for a telework request denial is also considered a best practice. Having a conversation with the employee about the reasons for the denial can present an opportunity to initiate a discussion about areas for professional growth and improved job performance that, in the future, could lead to a reconsideration of the telework request.

If you are unsure about how to proceed, contact your HR department for further guidance.

## **Next Steps: How to Ensure Telework Success**

Once you have determined that both the role and the employee are suitable for telework, you should establish a telework agreement that outlines the specifics of the telework arrangement. For example, a telework agreement might outline the days of the week in which an employee is allowed to telework. The agreement might also spell out the types of work that management expects will be completed during telework days, and it might specify the level of communication and responsiveness that is expected of the employee during telework (e.g. return any missed calls or respond to email within certain timeframes). The employee will be responsible for ensuring that the alternative worksite is appropriate and provides the work environment, connectivity, technology, resource access, and security authority consistent with the work in which the employee is engaged.

Check out the Human Resource Division’s telework page on Mass.gov for more information on establishing a telework agreement and to find tips on effective telework management. Also consult your HR department for specific procedures and paperwork your agency may require to begin a telework arrangement with your employee.

## Telework Employee Suitability Checklist

You may use this checklist to help you determine whether telework is suitable for a particular employee. Base your answers on the employee’s job performance, up to the past 24 months.

Make sure you have already determined that the position this employee holds is conducive to telework. Refer to Step 1 of this guide for further guidance on position suitability.

Please note that this checklist is not to be used as an evaluation. This checklist is merely a tool to support decision-making around telework arrangements.

Question	Yes	No
1. The employee has consistently met or exceeded performance expectations		
2. The employee has not been disciplined or has not been on a corrective action / remedial development plan over the last 24 months		
3. The employee is not currently serving a probationary period		
4. The employee has demonstrated the ability to work with minimal oversight		
5. The employee communicates proactively and effectively with managers, peer colleagues and, if applicable, direct reports		
6. The employee has demonstrated an understanding of role expectations and agency procedures		
7. The employee manages time effectively and consistently meets deadlines		

If the answer to any of the above questions is “no,” the employee under consideration may not be prepared to telework at this time. Consult your agency’s telework program or your HR department for guidance on the appropriate procedure to communicate denial of a telework request.