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## Introduction

Telecommuting at Sandia and within the Federal workforce has been optional for years. With the COVID-19 crisis, social distancing makes this a necessity that may be with us for some weeks and even months to come. All of us—whether new to telecommuting or an experienced remote worker—are challenged with how to efficiently and effectively adapt to this new work environment, while maintaining work-life balance to adequately care for ourselves and loved ones. The following sections provide a list of key challenges and best practices from curated articles from literature and trade journals that address the following questions:

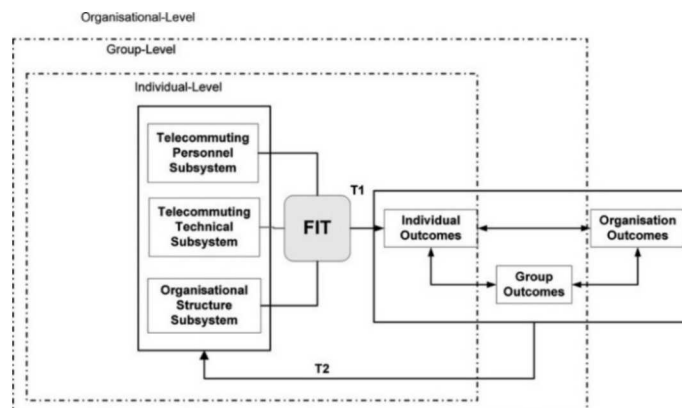
- **What are best practices for being efficient while telecommuting?**
- **What are best practices for leading a team that is telecommuting?**
- **What are best practices for managing while telecommuting?**
- **What are best practices for those who are caregivers at home for children, elderly, and/or partners while telecommuting?**

Every individual is unique, and in the current situation, each day may bring new work-related challenges. While many of these challenges are similar in principle, control over implementation of these best practices will vary depending on the individual's personal roles as a worker, team leader, and/or manager, and the day-to-day life challenges that they are facing at the same time.

Reference: Scott Berinato via [Harvard Business Review](#), March 23, 2020.

## Caveats

1. These are general best practices compiled from literature. The team has curated the literature based on our perception of relevancy. We have not analyzed how they might be implemented in the current situation at Sandia. Ongoing case studies of telecommuting experiences at Sandia will provide additional insights.
2. Best practices for individuals, team leaders, and managers constitute a multi-level socio-technical system with feedback. Increasing efficiency requires close coordination and consistency (FIT) among different levels of control.
3. Corporate Guidance and/or center policies are best sources for specific issues such as Security, ES&H, IT, HR, and Employee Assistance Programs.



Reference: Belanger, F., et al. (2013), "A multi-level socio-technical systems telecommuting framework," *Behavior & Information Technology* 32(12): 1257-1279.



## Individual Efficiencies

Telecommuting (also known as remote work and other names) is an established practice in much of US Industry and is applied to both knowledge/creative and procedural work. Employee and management practices during telecommuting need to evolve from those used in co-located work groups. There is a risk of employee detachment, loss of focus, and confusion—particularly in abnormal crisis situations when people are detached from normal routines. Initiating telecommuting is more difficult than traditional office-based work at first and requires more planning and learning effort of the part of both employees and managers. Over time, telecommuting processes smooth out and companies such as Google report an equivalence between on-site and off-site work. Individuals need to have a strong communications network—social as well as hardware/software. It is essential to have deliberate and strong communications about goals and decisions. Google Corporation states three phases of connections are needed: (1) *Getting Connected* (e.g., arranging logistics or schedules), (2) *Being Connected* (e.g., ensuring technical infrastructure supports the work being done), and (3) *Feeling Connected* (e.g., getting to know colleagues/teammates and building trust). Removed from the traditional home-work dichotomy, professional-personal life balance also changes and becomes more complex. Flexibility by employees and management at various levels is required for efficient and effective work as well as employee satisfaction.

Challenge	Best Practice
<b>Feeling of Isolation and Detachment</b> Loss of creativity with colleagues	A broad spectrum of literature implies that the importance of relationships cannot be overstated. Humans are highly social animals. For some employees the work they do may be tightly coupled to their personal identity creating stress when work patterns are disrupted such as during a crisis. Regular communication with colleagues, team members, and managers—both formal and informal—is essential. Video communication has the advantage of transmitting important non-verbal signals. Some companies use a group chat function that is always “on” for work-related discussion, questions, as well as social messages. A variety of software tools should be explored to enable different forms of communication ranging from informal to formal and for a single recipient to a large group.
<b>Inadequate Hardware, Software, and Home Workspace</b> Simple, reliable, and robust IT	Reliable and adequate hardware and software are essential. Communicate requirements and verify what is available and authorized from what resources when setting up for the first time—new purchases, surplus equipment, or personal—and ensure that these will be compatible with the systems of co-workers. Become familiar with processes to obtain access (passwords, network authorizations, Cryptocards, etc.). Prepare for unexpected limitations in the event of infrastructure failures that cannot be fixed from home. Seek out and take advantage of organizational resources that provides practical step-by-step instruction and references. Communicate any shortcomings or issues to management. Document if remote work requires expenses for increased residential internet service. Recognize that there may be trade-offs between reliability, efficiency, and productivity; keep it simple but effective.
<b>Work-Life Balance</b> Competing personal responsibilities; local distractions	Surveys show that work-personal life balance is improved by flexible schedules. Telecommuting increases flexibility and is advantageous for those caring for dependent children or elderly relatives. Structure is still necessary for work efficiency. Work periods should be clearly known both within the home and the employer. Employees need to maintain a routine within their family and telecommuting job. Employees with adult partners may alternate family care responsibilities creating clear times for work.
<b>Unclear Work Goals and Expectations</b>	The telecommuting employee and their manager(s) need to communicate and agree on work expectations and metrics. This is an ongoing process. The employee has more autonomy but also more responsibility to self-manage.



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## References

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## Leading a Telecommuting Team

Many best practices of leading teams translate well into leading telecommuting teams. Team leads should continue to work with their team to establish project goals, develop tasking and timelines to achieve those goals, and check in with team members to track progress and adjust as needed. However, telecommuting can present unique challenges in effective communication between team leads and team members. Establishing expectations of communication and finding ways to interact both formally and informally while telecommuting is important for successfully leading a remote-working team. Further, understanding and leveraging existing collaboration tools at Sandia may ease the transition to and improve overall effectiveness of wide-scale telecommuting.

Challenge	Best Practice
<b>Overcoming Communication Barriers</b> Different modes of communication may be used when telecommuting, and expectations for communication can be unclear when face-to-face meetings are infrequent	Establish agreed-upon methods and expectations for communication. Decide on mediums, methods, and frequency of communication as well as ways to convey when and what type of responses are expected. Communicate structure, intent, and expectations of meetings in advance. Be clear and concise with formal communication to avoid overloading team members, and consider using other channels (e.g., Skype chat, <a href="#">Mattermost</a> messaging platform) for informal communication. Check corporate resources frequently. Establish times for teams to meet, but also be available for one-on-one meetings as needed.
<b>Communicating Goals and Evaluating Progress</b> Key traits for project leads, such as clear communication of goals and tasking and tracking progress, are potentially more difficult and critical for successfully leading a telecommuting team	Clearly communicate project objectives and steps needed for the project to succeed. Develop a timeline for individual team member contributions including necessary budget and resources. Regularly check in with team members to understand progress and adapt timelines and goals as needed. Consider keeping track of goals, timelines, and progress in a project <a href="#">SharePoint</a> or <a href="#">Wiki/Confluence</a> site that allows team members to update individual progress and a discussion of broader strategies and goals for the project. Allow for some slack time to accommodate technical system failures due to telecommuting. Don't forget team celebrations; be creative.
<b>Maintaining Professional and Personal Relationships</b> Volume of communication is often reduced among telecommuters, with most focus on project-essential topics and less on topics that are personal or otherwise not directly related to work	Maintaining rapport and friendship with team members can be equally as important as communicating project status and tasking. Take time before or after meetings to let team members talk about what else they've been doing outside of the project, including other projects they're working on and activities outside of work. Consider setting up informal channels to allow team members to share at their own convenience.
<b>Accommodating Various Work Schedules</b> Team members may be in different time zones or may have varying schedules for other reasons, like caring for children	Try to accommodate all team members' schedules as best as possible. If regular scheduling conflicts occur, check in with individual team members as needed and rotate meeting times so that all members can join in team meetings.



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## References

### Articles

Google, [Distributed Work Playbooks](#), Telecommuting guides for employees, managers, and project leaders

U.S. General Services Administration, [Mobile Worker Toolkit: A Notional Guide](#), General guide to building and maintaining telecommuting teams

Vega, Gina and Louis Brennan, [Managing Telecommuting in the Federal Government: An Interim Report](#), Establishing telecommuting programs

### Podcasts or Webinars

The Explainer via Harvard Business Review, [How to Collaborate Effectively If Your Team Is Remote](#)



## Managing (Individual Manager and Organization) While Telecommuting

Managing telecommuters successfully requires much more than simply providing the right technology. Managers also need to develop and communicate adjusted policies on performance expectations, assessment, and feedback for the remote work force that treats on-site and off-site employees fairly and equally. Successful managers develop procedures for remote training and troubleshooting, and for teambuilding among remote and on-site workers. They develop personal practices to model thoughtful and effective communication with remote workers; provide emotional as well as technical support; reduce the isolation of remote workers; and promote the building of new relationships. Having difficult conversations and addressing conflict between remote workers without the benefit of face-to-face conversations may require special consideration. These responsibilities can be overwhelming to managers for whom a remote workforce is new, requiring the development of personal skills at setting and communicating boundaries. Most best practices summarized below assume “operations as usual.” When employed as a Continuity of Operations strategy in emergencies, the demand on managers is even greater to help employees navigate the stress, uncertainties, and vulnerabilities.

Challenge	Best Practice
<b>Communicating Effectively</b> Loss of face-to-face interactions; varied schedules; unfamiliar technology	Provide information on when you are available and set guidelines for how and when you will respond to phone calls and emails. Establish a regular schedule of telephone/Skype meetings with each individual employee and meetings with the entire team. Use video to the extent possible for complex issues. Engage each staff member during group meetings. Have back-ups (multiple modes) for communication. Facilitate agreement on means for informal engagement (chat rooms, instant messaging, etc.). Use phone for immediate feedback and sensitive issues rather than emails.
<b>Providing Support</b> Knowing and responding to diverse emotional, technical, physical needs of employees	Use time during team meetings and one-on-one conversations to check in on team or personal issues that need to be addressed. Develop and share best practices for coping with unique remote work challenges. Understand that each telecommuter will face unique challenges, be flexible as not all solutions will work for everyone on the team. Encourage team pairing, or “buddy” systems.
<b>Reducing Isolation, Promoting Inclusion, Building Relationships</b> Cohesion and diversity among dispersed workers; respecting individual needs; on-boarding new workers	Make clear your goals of trust, inclusion, and group cohesion. Conduct frequent, informal, one-to-one meetings to reduce risk of isolation. Start weekly meetings with informal discussion about personal and family news to help with relationship building. Promote individual and team efforts during team meetings. Encourage each team member to lead a virtual team meeting, with an “about me” presentation, such as past and current work interests. Moderate the amplified tendency to lean on those you know best for critical tasks. Expand mentoring and on-boarding process of new workers.
<b>Managing Performance</b> Building trust; adjusting and communicating performance expectations and metrics in absence of face-to-face contact	Establish ground rules: Clarify and prioritize goals, tasks, and roles to coordinate work processes. Provide clear policies, rules, and expected norms, allowing for individual and team needs and circumstances. Provide frequent feedback to build trust. Evaluate performance by results. Foster accountability without micromanaging. Empower teams so manager is not a bottleneck. Calibrate time allocations for tasks to telecommuting reality. Recognize and suppress tendency for remote work to multiply. Communicate how you are ensuring visibility and opportunities for all, and new routes for success.
<b>Managing Classified Project Work</b> Separating classified and unclassified work activities; reconciling on-site and off-site work and teams	Classified projects may have significant unclassified portions that can be partitioned in the workflow and performed remotely, reducing the amount of on-site presence to fundamentally classified work. This most closely resembles the situation of “co-work” as described in literature. Additionally, a 2018 RAND Report outlines the challenges and benefits of moving intelligence community work to unclassified facilities. It echoes the OPM recommendation that expanded telework options be considered by all federal agencies to help in future disasters or continuity of operation plan events.





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Challenge	Best Practice
<b>Addressing Behavior Issues and/or Conflict</b> Detecting behavioral issues; effective process for difficult conversations	Watch for behavioral changes as workers adjust to telecommuting. Having workers not able to perform their usual tasks, and see their main contacts (in some cases, their only social circle) can lead to issues deeper than just stunted communication. Develop and communicate a transparent, confidential process for bringing issues to you and raising issues with remote workers. Consider the home situation of remote workers when choosing when and how to address issues.
<b>Setting Boundaries</b> Adjusting to changes of remote work and increased demands of dispersed workforce can be overwhelming	Understand that managing a remote work force places additional burdens on managers. Acknowledge and communicate limitations. Seek your own support and training. Clarify what are your responsibilities versus the organizational/corporate responsibilities. Avoid burn-out. Your actions set expectations to the team to ensure everyone is completing work but also practicing self-care (e.g., no emails late night or on the weekends). Let go of what you can't control.

## References and Resources

Clark, Timothy via *Harvard Business Review*, [8 Ways to Manage Your Team While Social Distancing](#), March 24, 2020

Ye, L. R., [Telecommuting: Implementation for Success](#), International Journal of Business and Social Science, 3(15) 2012

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[Federal Work-Life Survey Governmentwide Report](#), (2018) US Office of Personnel Management, Washington DC



## Individuals as Caregivers

Strategies for maximizing efficiency and productivity while telecommuting are well documented in literature; however, little guidance exists concerning telecommuting while also providing care to children or elderly parents. With schools and daycares closed, members of the workforce are finding themselves faced with the unprecedented challenge of simultaneously fulfilling both the role of a fulltime caregiver and of a fulltime professional staff member. A key aspect concerning the ongoing pandemic is that alternative forms of care are unavailable due to mandatory closure of nonessential businesses, social distancing constraints, and restrictions in place regarding socializing with individuals outside one's household. Going forward, the assumption is that members of the workforce and those they care for are confined to the same enclosed space for the foreseeable future, with little or no outside assistance. Anticipated challenges for individuals as caregivers are provided below, along with best practices to mitigate stress and maintain productivity. While caregiver is used interchangeably for childcare, elder care, or others, it is important to note that the type of care provided will have unique challenges and best practices.

Challenge	Best Practice
<b>Communication Concerning Expectations</b> Competing expectations for availability between the household and work force	Communicate with your manager your caregiver role and the expectations and limitations for availability. Work with your manager to establish a schedule and plan to complete project work while also maintaining your caregiver role. Communicate to your team during conference calls that you are providing care, as interruptions and/or emergencies may occur throughout the day. Communicate boundaries (when applicable) to the household: set expectations for times unavailable for non-emergency situations. Be patient with yourself and flexible; discuss challenges and setbacks with your manager, and work together to address them.
<b>Accommodating Flexible Work Schedules</b> Depending on their caregiver role, team members may need to complete project work earlier or later or during specific blocks of time during the day	Build a modified schedule based off the previously established routine. Clearly define blocks of time with set "office" hours and blocks of time unavailable for work to complete caregiver responsibilities, (meals, childcare schedules, etc.). Plan work and caregiver activities for each day the night before. Schedule meetings, or time spent on project activities, during times your child is otherwise occupied, (naps, movies, scheduled activities). Plan activities for your child that can occupy them during meetings and notify other participants that interruptions may or will occur. Allow extra time in the schedule to manage unanticipated distractions. Be patient and be prepared to adapt if the planned schedule is not working. Caregiving responsibilities are unique depending on the type of care or age of the child(ren); the following provides tips/best practices by age group, for working at home with children: <a href="https://www.poynter.org/business-work/2020/how-to-work-from-home-with-kids-around/">https://www.poynter.org/business-work/2020/how-to-work-from-home-with-kids-around/</a> .
<b>Working Productively While Performing Dual Roles</b> Team members who are also caregivers have competing roles to fulfill throughout the day	Stay focused by separating the caregiver role from the workplace role. Establish an area used exclusively for work to detach from household responsibilities. This can be as simple as a special chair at the dining room table. Block out time on your calendar and physically leave the "office" area to focus on caregiver responsibilities. Set visual boundaries (closed door, a sign) to communicate "work" time versus "family" time to the household. When possible, take breaks to mentally and physically recharge.

## References

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