

# Gartner for IT Leaders Toolkit

## Template for Remote Work Policies

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**The instructions, intent and objective of this template are contained in the source document. Please refer back to that document for details.**

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## How to Use This Template

- Sections in plain text are standard. Gartner recommends using this text as is.
- All advisory comments, optional sections and places where you must choose between elements are provided in italicized, underlined text within brackets [*like this*]. **Delete or overtype this text.**

## Policy Background and Context

The purpose of this policy is to define accepted practices, responsibilities and procedures for employees who [*organization name*] authorizes to work at home or in a designated alternative work site. This policy defines the commitment requirement and provides guidance for:

- Terms of participation and eligibility for remote working
- Accountability and evaluation
- Use of and responsibility for remote work equipment and resources
- Establishing and maintaining a suitable workspace
- Security and confidentiality
- Technical support processes

## Definition

Remote work refers to jobs that are performed away from a traditional corporate office in a remote location on a full-time, part-time or occasional basis.

## Scope

Remote workers are expected to meet all the responsibilities, perform all the duties and comply with all the policies that apply to any workers in similar roles, regardless of the location. Employees can work remotely when they:

- Meet all eligibility requirements
- Hold jobs that are suitable to be performed away from a corporate office
- Maintain adequate performance levels
- Have the [*written*] approval of their managers

Remote work applies to employees who have a formal agreement to work at home or at a designated alternative workspace for one day or more per week. It does not apply to employees who work off-premises for a temporary, limited duration of time and do not require a formal agreement.

## Terms of Remote Work Participation

- Remote work is a benefit and not a right, unless specifically required in the job description or in the terms of employment.
- Remote work will not change salary, benefits, compensation, vacation or other benefits.

- Remote work will not alter requirements to comply with employee duties and responsibilities or comply with company policy.
- Workers — both hourly and exempt — must track their remote work time in the same way as they do office time.
- Remote work creates no additional overtime requirements, and unauthorized remote work overtime will not be compensated unless expressly authorized by the remote worker's manager.
- *[Organizations should decide if new employees will be required to attend orientation classes and/or spend some number of weeks working in a company office prior to beginning a remote work program. These requirements may be modified or waived for positions that were specifically listed as being remote work or in cases where remote work is included in the terms of employment.]*

## Eligibility for Remote Working

- The remote worker must have a satisfactory performance rating and not be subject to any disciplinary actions or performance remediation programs.
- The remote worker must have completed any required probation or trial periods (unless waived).
- The remote worker's job must not require physical presence at an office location.
- Individual has the sufficient experience and skills level to take control of when and how he/she gets the work/job done without the need of a manager nearby directing and monitoring.
- The job can be adequately performed at the remote worker's designated location.
- Work output or outcome is measurable.

The remote worker must maintain an agreed-upon level of performance. If performance declines, remote working privileges may be rescinded.

Reasons to deny eligibility may include:

- Working with classified documents
- Working in a high-security area or department
- Working in a department with rigorous discovery and compliance requirements
- Temporary or probationary employee status
- Job (such as receptionist or frontline customer service representative) requiring full-time physical presence at an office location

## Accountability and Evaluation

### Work Requirements

- Amount of time spent remote working may vary according to the requirements of the employee's job, specific project requirements, managerial discretion and the remote work agreement. Time

required in the office may be further determined by communications with clients, co-workers and scheduled events.

- Terms of participation in the remote work program may be changed or revoked based on the remote worker's ongoing performance ratings and/or change in job requirements.

## Availability and Communications Requirements

The remote worker must:

- Conduct themselves with a level of professionalism commensurate with the work they are performing.
- Provide status updates in the format and at the level of frequency agreed with the manager.
- Be available to customers and co-workers by telephone, email and any other agreed-upon communications mode within the hours agreed on with his or her manager — unless the remote worker is already scheduled for other activities.
- Respond to phone, voicemail and text messages within the time window agreed with his or her manager.
- Attend all scheduled team or customer meetings by phone, video conference or in person, as required.

## Performance Measurement

- Performance must be judged by results, not by the process used to achieve the work. *[If the organization commits to a remote worker program, then the organization is responsible for adjusting the measurement criteria to ensure that they will be appropriate for all qualified remote working employees.]*
- Performance goals will be set jointly by the remote worker and his or her manager in compliance with HR policies.
- Performance criteria may include, but are not limited to:
  - Completed work that is on time
  - Meets standards set for quality and quantity

## Use of and Responsibility for Remote Work Equipment and Resources

### Determining the Appropriate Equipment and Resources

*[Organizations need to determine whether they will provide a standardized set of equipment for remote workers or allow the remote workers to procure their own equipment. In either case, decisions must be made and communicated in the policy document regarding:*

- What type of company-owned computers, office equipment and software will be made available.
- Whether corporate insurance will cover corporate assets located in a remote worker's home office or alternative workspace.

- What types of office supplies will be offered, and the processes by which remote workers can obtain them.
- Whether employee-owned equipment will be permitted.
- Whether the company will provide stipends to defray the costs of the employee-owned equipment.
- Whether telephone and internet services will be paid for by the employee or the company. If the employee pays for these services, how will they be reimbursed and for what amount? If the company pays for the services, what is the billing procedure?

## User Responsibility for Remote Work Equipment and Resources

### Appropriate Use

- [Organization name]'s equipment and resources may be used only for business and only by [organization name]'s remote workers. It is the remote worker's responsibility to ensure that all items are properly used.
- If employee-owned computing, phones and smart devices are used, the remote worker must follow all [organization name]'s policies for employee-owned devices. [Insert link to appropriate policies here.]

### Asset Protection

- The remote worker must take reasonable precautions to protect [organization name]'s equipment and resources from loss, theft or damage, applying the same standards of care in the home office or alternative workspace as when regularly working at a company office.
- The remote worker is responsible for any wear and tear on personally owned equipment used for [organization name] business.
- [It is a best practice for the company to insure company assets at a remote worker's home against loss, theft or destruction. This may require an additional rider and a complete list of the specific asset tags or serial numbers. Determine and document the company's ability to insure the assets. If, for any reason, the company cannot, then document who is liable for the cost of lost, stolen or destroyed equipment.]
- [If, for any reason, it is determined that the remote worker is liable for the costs, then insert this bullet.] If [organization name]'s equipment and resources are used in a home office, the remote worker must check to see if the items are covered under the remote worker's homeowner's insurance policy. If a rider listing specific serial numbers is required, the remote worker is responsible for creating the rider and presenting documentation to his or her manager.
- In the event of loss or theft, the remote worker must report the incident to [appropriate position or department and contact information] within [time frame].

## Establishing and Maintaining a Suitable Workspace

### User Workspace Requirements

- The remote worker must provide a suitable work environment that allows them to perform all job requirements.
- The designated work area should provide:
  - Ergonomically sound seating, lighting and writing or typing surfaces.
  - Adequate noise control to ensure clear telephone and video conference calls to colleagues and customers.
  - Adequate privacy provisions, including, where appropriate, locking doors and windows to ensure that family or house members do not have access to confidential *[organization name]* materials.
  - Freedom from distractions and interruptions that might affect workplace performance.
  - *[Locking cabinets for physical documents.]*
- *[Organization name]*'s confidential documents or materials taken from company offices must be kept in a designated work area and handled with the same level of security as within the company office:
  - If documents or materials are required to be in a locked drawer in the company office, then the same is required at the remote worker's designated work area.
  - The same level of company policies regarding disposal of sensitive printed documents applies to a remote worker's workspace.
- The remote worker must take precautions to ensure that monitor screens and/or printed materials with sensitive data (such as health records, customer personal information or financial data) are not visible to others.
- The remote worker should ensure that the physical attributes of the remote worker's office conform to basic safety standards.
- *[Organizations should check to see if the geographies in which employees work have remote work regulations they must adhere to.]*

### Work-Related Injuries

*[The organization must consult with its legal and HR departments to ensure compliance with workers' compensation laws specific to the remote work location, and to clarify local liability laws.]*

- The remote worker will be covered by workers' compensation from *[insurance plan]* for job-related injuries that occur while remote working.
- The remote worker remains liable for injuries to third parties and/or members of the remote worker's family on the remote worker's premises.

## Security and Confidentiality

Remote workers must ensure the same, if not a greater, level of security for all company network and data access; physical documents; and any health, customer information or otherwise sensitive information that might be displayed on a home office computer screen.

All remote workers must:

- Adhere to *[organization name]*'s security and remote-access policies *[link to security policies]*.
- Follow *[organization name]*'s policy regarding the storage location of electronic data.
- Follow *[organization name]*'s policy regarding the use of personally owned devices; for example, laptops, smartphones or tablets, to access *[organization name]*'s networks and data.
- Ensure that remote-access communications and stored data cannot be read by unauthorized parties, including a remote worker's family members or visitors.
- Guard against sensitive data being viewed on monitor screens — in the home office or while traveling.

## Technical Support Processes

*[The organization must determine the appropriate installation and support processes for remote workers using company-owned and employee-owned devices, as well as how these services will be provided (in-house or third-party support).]*

- *[Specify how remote workers can access in-house technical support; for example, by phone, chat or a website.]*
- *[Determine how installation services for new company-provided devices such as laptops will be provided. Provide a detailed setup guide for all equipment delivered to remote workers.]*
- *[Determine how maintenance services, such as laptop upgrades will be provided, and how the remote employee can comply with them.]*
- *[Specify whether loaner systems are available to maintain productivity during a maintenance incident. If loaners will be made available to remote workers for the duration of the maintenance incident, outline the process for receiving and returning a loaner.]*
- *[For employee-owned equipment, specify what is covered and how employees obtain support.]*
- *[If third-party support is provided, supply the support provider's contact information, along with an outline of service processes.]*

## Related Documents

- *[Reference those that apply, for example:*
  - *IT security policy*
  - *Mobile device policy*
  - *Remote access policy*

- [\*BYOD policy\*](#)

## **Additional Resource**

[Telework Training](#)

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