OPERATIONAL ASSESSMENT & POSITION EVALUATION GUIDELINES FOR TELECOMMUTING

(for use by HEERA Managers)

As part of the Cal Poly Pomona Telecommuting Program, HEERA Managers should review department operational needs and each position to determine staff eligibility for telecommuting.

The Operational Assessment & Position Evaluation Guidelines for Telecommuting is provided as a tool to assist HEERA Managers in assessing operational needs and determining the feasibility of the Telecommuting Program. This is intended to be a companion tool used in conjunction with the Cal Poly Pomona Telecommuting Program documents. The CPP Telecommuting Program documents can be found at https://www.cpp.edu/eoda-hr/departments/elr/telecommute-program.shtml.

Step 1 - Operational Assessment:

Assess department operational needs to determine operating hours and number of staff/resources needed to meet the on campus operational expectations as determined by your division. When evaluating department operations, keep in mind the following guiding principles:

- First consider operational needs and whether work to support and meet those needs may be done remotely. Who is your area supporting/interacting with? Are these individuals on campus, off campus or both? What are the patterns of peak/off peak volume of activity?
- Department operations should provide optimal levels of service at all times.
- Consider whether regular onsite meetings or in-person client/customer/student interactions preclude a hybrid arrangement. Consider the frequency and the degree to which they are within the staff's control. For example, a consultant or trainer may be able to schedule sessions for days they are onsite whereas an advisor whose students "drop in" in-person, or a staff at an in-person customer service window cannot.
- Student facing and "front office" operations should always have adequate staffing.
- Telecommute arrangements should not negatively affect students or services. Virtual offerings for meetings or service can continue and are encouraged if they enhance access to services but there should be the opportunity for on campus and in-person meetings or service during normal university operating hours when desired.
- Telecommuting arrangements must not negatively impact colleagues or another department's workload, workflow, or productivity by shifting burdens, creating delays, or adding steps in the workflow. Be mindful of how your department telecommute structure has an effect on the work and operational flow of others on campus.
- Consider any changes needed to ensure your team continues to meet its objectives. Ensure that the staff and work product will be as effectively

managed as their on-site colleagues.

- Ensure work performed via telecommuting can be completed in full compliance with Cal Poly Pomona's security protocols, including privacy of level 1 data.
- Consider not having designated office/cubicle spaces for anyone telecommuting 50% or more.
  Staff can use unassigned shared office/cubicle spaces and other spaces can be repurposed for more effective use.
- Consider replacing desktop computers with laptops and docking stations to allow for greater flexibility and cost savings overtime.
- Innovation, collaboration, and sustainability are essential to Cal Ply Pomona's goals and values.
- While these guidelines and processes are applicable to stateside staff, departments with a mix of stateside, faculty, and auxiliary employees should refer auxiliary staff to the appropriate auxiliary HR coordinator for guidance on telecommuting policy for auxiliary employees. Faculty should be referred to Faculty Affairs for guidance on telecommuting policy for faculty.

Step 2 - Position Evaluation:

Review each position or group of positions in your department/unit to assess the appropriate work arrangement and if there are opportunities for telecommuting.

Positions with responsibilities that can be conducted off-site using readily available campus technology and infrastructure at a telecommuting site without adversely impacting department service quality or organizational operations may be suitable for telework.

Positions with job responsibilities, as determined by their HEERA Manager, must be of a nature in which face-to face interaction with members of the campus community is minimal or may be scheduled to permit telecommuting. The participating staff must also be able to access the necessary programs, software, and technology to complete their job duties.

One of the following categories will result from the position evaluation:

- **Fully Onsite**: Working at a Cal Poly Pomona on campus worksite 100% of the schedule. May have an alternative work schedule such as 9/80 or 4/10 schedule.
- **Hybrid Telecommuting**: Working part of the work schedule from a remote location other than a Cal Poly Pomona on campus worksite; typically, 1-4 days per week.
- **Routine Full-time Telecommuting**: Working from a remote location other than a Cal Poly Pomona worksite 5 days a week with the expectation of as needed, infrequent onsite work (e.g., department or division meetings).

For positions that are determined to be eligible for telecommuting:

In the Telecommuting Work Performance Expectations section of the Telecommuting Agreement, please clarify any specific duties/responsibilities that contribute to why the position is suitable or not suitable for certain telecommuting/remote work arrangements. This will aid in communications with the employee and demonstrate transparency in the process. If a position is identified as onsite, please consider and note if the position would be eligible for an alternative work schedule.

When evaluating positions, keep in mind the following guiding principles:

- Telecommuting work arrangements must be job appropriate.
- The review process must be equitable and decisions must be made without bias or favoritism. This does not mean all staff are treated exactly the same, but rather the department is consistent with their criteria for determining eligibility for participation in the telecommuting program. Every staff member who requests telecommuting is given consideration.
- Similar positions should be given the same opportunity to either participate in telecommuting and/or share the same expectation of return to campus. Unless there are work performance concerns with specific staff (Please see HEERA Manager Telecommute FAQ's for more information).
- Telecommuting arrangements are not permanent agreements. They can and should be changed as needed to ensure the department's operational needs are met at the intervals of activity relative to the department's operations and should not be longer than 12 months e.g. peak/off peak seasons, per semester, academic calendar, fiscal year.
- HEERA Managers should not deny or approve telecommuting as a form of a medical accommodation. Employee requests to telecommute due to a disability or medically related reason are managed through the Reasonable Accommodation Process and not through the Telecommuting Program. If an employee requests to telecommute or requests for additional telecommuting days due to a disability or medically related reason on top of any previously agreed upon Telecommuting Program days, this request should be managed through the Reasonable Accommodation Process.

  Employee's requesting to telecommute due to a disability or medically related reason, should contact the ADA Coordinator to begin the Reasonable Accommodation Process. The ADA Coordinator can be reached by telephone at (909) 869-4095 or by email at ADACoordinator@cpp.edu. HEERA Managers should not inquire into an employee's specific medical condition or background.

Step 3 – Telecommute Agreement:

HEERA Managers first meet with staff requesting to participate in the CPP Telecommuting Program to discuss eligibility requirements. Staff should be made aware of the reason their request is being denied: specific job responsibilities that are not able to be performed remotely, the adverse impact to the service quality or organizational operations if their position worked remotely, or less than satisfactory work performance. HEERA Managers may contact the Office of Employee/Labor Relations at elr@cpp.edu for guidance and support in these situations.

- If staff is authorized to telecommute, in collaboration with the HEERA Manger (Please see HEERA Manager Checklist) they must complete a Telecommuting Agreement Form, Telecommuting Work Performance Expectations and Telecommuting Home Safety Checklist Form in the CPP online platform identified for staff use.