FlexWork Pilot: Day-to-day norms

Communicating our regular/recurring schedule and status to team members and collaborators, whether onsite or remote.

**Prerequisite:** All staff have worked with their managers to complete the preparatory steps described on the previous page, and have worked with managers and HR to approve all regular/recurring remote work schedules.

**Norm 1:** Exchange calendar is the primary tool we use to communicate our regular schedule, status, and contact information, supported by using the status message tool in Slack (e.g., setting our Slack status to “Working remotely - see Exchange calendar for schedule”).
- The primary goal here is to cut down on the number of daily status emails being sent out, by shifting announcement of recurring schedules and statuses to our Exchange calendars, and reserving email/chat only for changes to those regular schedules.

**Norm 2:** Remote staff do not need to communicate our reason for working remotely to team members or collaborators (unless the remote staffer feels it is appropriate or necessary).

**Norm 3:** Remote staff do not need to communicate our specific location to team members or collaborators when working remotely.

**Norm 4:** During work hours (communicated through Exchange calendar), availability is the default (within reason: see responsiveness norms, below).
- By extension, this means that if staff are unavailable (for any reason) during regular work hours, this unavailability must be communicated using Exchange calendar, either by a meeting event on the calendar, a private event on the calendar, or blocked off time for quiet work.

Communicating occasional schedule/status changes to our teammates and collaborators (after you've worked out the changes with your manager and HR!)

**Norm 5:** Email or chat are the primary methods of communicating unexpected or occasional changes to our regular work schedule or status, in order to open a dialogue with team
members, collaborators, or management (particularly if others will be affected by our change in status, for example, onsite meeting coordinators who need to set up virtual meeting technology).

- Clearly communicate remote work hours for the day, and clearly communicate the best method of contact.

**Norm 6:** If we have clearly communicated our need for unexpected or occasional remote work to our manager or AD (and the remote work is approved), **Norms 2, 3, and 4** from above still hold.

- If the situation is not an emergency, we'll add an event to our Exchange calendar indicating the change in status from onsite to remote, using the event title to communicate our status and the best method of contacting us.

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**Responsiveness to communications, whether onsite or remote.**

**Norm 7:** To the extent reasonable, we’ll clearly indicate our expectations for responsiveness when sending a communication and clearly indicate the nature of the request in the initial communication. This norm applies to chat, phone, and meeting invitations in addition to email.

- Email example: put *need response by May 17th* or *no response required* or *urgent - please reply within 1 business day* in the subject line.
- Chat example: *this is urgent, please point me to the documentation for X* as the initial chat message.
- Calendaring example: indicate whether attendees are required or optional on an invite, and clearly indicate the purpose of and agenda for the meeting (whether standalone or recurring).

**Norm 8:** While Slack is a widely-accepted method of initiating an urgent communication, email (and more specifically, the ticketing system maintained by TS3) is the preferred medium for urgent system-related communications, to facilitate recordkeeping and easily share the communication with other staff. Essentially, if we are communicating about a system issue that needs to be fixed, the communication needs to be documented in a ticketing system (and closed out in same), even if much of the real-time dialogue occurs on Slack.

**Norm 9:** If we receive a communication that is clearly marked “urgent” during our normal work hours, we’ll send a response within one business day. At minimum, we’ll send a meaningful acknowledgement of the communication, even if we are not yet able to fully respond.
Norm 10: If we receive a communication that is not urgent, but which requires information from us, we’ll send a response within 3-5 business days. At minimum, we’ll send a meaningful acknowledgement of the communication, even if we are not yet able to fully respond.

Norm 11: When we receive a meeting invitation in Exchange and we are a required invitee, Norm 9 and 10 apply.
- If we are a required invitee and we must decline the meeting, we’ll include a brief explanation in our response, and offer potential next steps for rescheduling.

Norm 12: The onus is on us as individuals to keep our calendars current - in addition to the responsiveness expectations outlined in Norms 9-11, we’ll review our calendars on a regular basis (for example, at the start of each week) to ensure that we’ve sent responses to all meeting invitations so that meeting organizers are able to plan for an accurate headcount or reschedule if needed.

Coordinating meetings that involve virtual participants, whether onsite or remote

Norm 13: WebEx using both audio and video is the norm for running virtual meetings with multiple participants.
- The decision to conduct a virtual meeting with just audio (eg. by phone, or audio-only WebEx) should be led/made by the virtual participants.

Norm 14: It is primarily the meeting organizer’s responsibility to decide what virtual meeting technology will be used, coordinate the technology setup, and ensure that the method of joining the meeting is clearly communicated to all attendees, but this does not preclude us from working together to ensure virtual meetings are set up properly.
- We will check in with virtual attendees in advance to ensure that they have the information they need to join the meeting, and check in with virtual attendees during the meeting to ensure that the virtual meeting technology is functioning properly.
- If something goes wrong during the meeting, it is our responsibility to follow up with virtual attendees afterwards to ensure they have all the information they need.

Norm 15: Libraries-wide, meeting organizers will honor the remote work schedules defined by ITDD staff, and will set up virtual meeting technology in order to accommodate remote attendees according to Norms 13-14.
- Exception to this norm: for the duration of this pilot, onsite, in-person meetings are the default for all Libraries staff who are participating in or conducting job interviews, unless specifically arranged otherwise with HR.