

Toolkit

The IT Peer Community. No Vendors. Ever.



HUMAN RESOURCES

These NOREX Member-contributed documents include interviews and questionnaires, org charts, new employee, lifecycle, administrative, skills assessment, training, development, telecommuting, discipline, termination, policies, procedures, time and attendance, RFP, conflict of interest, whistleblower, and discussions around HR issues. | TK011

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TO REQUEST A DOCUMENT FROM THIS TOOLKIT, NOTE THE TITLE / NUMBER AND ADD THEM TO THE COMMENTS AREA ON THE REQUEST FORM [HERE](#).

Confidentiality Agreement

CONFIDENTIAL CHANGE FORM This fillable form records changes in personnel files, such as in salary and position. 1 Page (20-980)

CONFIDENTIALITY AGREEMENT Confidential information is defined, and terms, restrictions, and exceptions to confidentiality are expressed in this agreement. 3 Pages (20-772)

PROVIDER CONFIDENTIALITY & SECURITY AGREEMENT This agreement applies to any provider party who is on site or who requires access to the company network. 2 Pages (20-539)

CONTRACTOR DATA INTEGRITY / CONFIDENTIALITY This is an agreement template between an organization and services contractor. 1 Page (20-087)

DATA SHARING AGREEMENT The following data sharing agreement template is HIPAA compliant. 3 Pages (20-086)

HIPAA BUSINESS ASSOCIATE AGREEMENT This agreement template is between an organization and a HIPAA compliant organization. 7 Pages (20-085)

CONFIDENTIALITY AGREEMENT This agreement template outlines the intent of both parties in regard to the protection of information. 2 Pages (20-084)

ACCEPTABLE USE / CONFIDENTIALITY This agreement describes the standard policy of the use of company Information Technology resources and data contained therein. 5 Pages (20-043)

Employee Exit & Termination

COMPANY EQUIPMENT AGREEMENT The following is an agreement for the care and return of company-owned equipment such as iPads or laptops. 1 Page (20-1240)

EQUIPMENT RETURN AGREEMENT This agreement covers the return of company-owned equipment in the event of employee resignation or termination. 1 Page (20-1239)

ONBOARDING AND OFFBOARDING EMAIL TEMPLATES These templates are examples of typical correspondence from the IT department for new hires or departing employees. 2 Pages (20-1153)

SEPARATION OF EMPLOYMENT POLICY This policy describes procedures for when an employee is terminated or leaves the organization, including return of company property and exit interviews. 2 Pages (20-913)

OFFBOARDING TASK CHECKLIST This task checklist helps to track what IT-related items have been completed when an employee leaves the company. 1 Page (20-878)

OFFBOARDING CHECKLIST Designed for an employer, this checklist example applies when preparing for an employee's departure. 1 Page (20-637)

EMPLOYEE TERMINATION FORM This out-processing document lists tasks to be completed upon the termination of an employee, such as computer lock-out, return of company property, etc. 2 Pages (20-276)

EMPLOYEE EXIT & TRANSFER FORM Tasks such as computer system access, phone transfers, and other Human Resources functions must be done as an employee exits or moves from one department to another. 2 Pages (20-275)

SEPARATION OF EMPLOYMENT CHECKLISTS Topics such as records retention, security, web access, retirement, personnel records, and more are outlined in this series of employee exit checklists. 10 Pages (20-269)

EXIT INTERVIEW QUESTIONS An employee can provide useful information upon his/her departure from employment. This template includes questions to aid in this process. 3 Pages (20-249)

EXIT CHECKLIST This checklist helps the employer and employee complete necessary tasks upon the exit of an employee. 1 Page (20-248)

EMPLOYEE EXIT LETTER Following is an exit letter template providing information about insurance plans & 401K follow-up contacts. 1 Page (20-247)

EMPLOYEE TERMINATION POLICY This policy describes termination due to resignation, retirement, job abandonment, or termination. 1 Page (20-228)

GLOBAL IT PMO / PM ONBOARDING This plan describes SharePoint and Planview guidelines and procedures for Project Management Office onboarding, project lifecycle, and hosting meetings. 2 Pages (50-402)

Hiring & Interviews

IT ADMIN INTERVIEW QUESTIONS The following are example questions for an IT Administrative Assistant job applicant. 1 Page (20-1234)

EMPLOYEE SNAPSHOT This form provides a quick view of plans, strengths, weaknesses, interests, and career goals of new hires. 1 Page (20-1219)

ENTERPRISE GRADE SECURITY The following was presented at a NOREX International Roundtable. It outlines how one organization created their security operation while staying within their budget. 11 Pages (20-1218)

NEW HIRE BUSINESS CASE This document details the business case for adding headcount to a department and team. 2 Pages (20-981)

ERP SYSTEM CONSULTANT INTERVIEW QUESTIONS & NOTES The following are suggested interview questions to ask a potential ERP System Selection Consultant. 2 Pages (20-860)

MANAGEMENT DEVELOPMENT This describes courses for transitioning to management, including challenges, meeting expectations, delegating, interviewing, and hiring. 6 Pages (20-529)

CUSTOMER DISCOVERY TRACKING This worksheet includes interviews with multiple people in various jobs regarding topics such as vendors, BYOD, Mobile Device Management, and more. 9 Pages (20-502)

HELP DESK TECHNICIAN INTERVIEW QUESTIONS The following are questions helpful to an interviewer who is looking for a qualified Help Desk Technician. 1 Page (20-465)

UTILIZING IT RECRUITMENT FIRMS This presentation follows a NOREX WebForum and outlines the keys to success in working with IT recruitment firms. 8 Pages (20-218)

UTILIZING RECRUITERS An IT manager follows four main processes when using a recruiter that may enhance the chances of a successful long-term hire. 3 Pages (20-217)

RECORDS MANAGER FOLLOWUP INTERVIEW The following are appropriate questions for a second interview of a potential Records Manager. 5 Pages (20-021)

RECORDS & INFORMATION MANAGER SECOND INTERVIEW Questions for a second interview of a prospective Records and Information Manager are below. 2 Pages (20-020)

RECORDS & INFORMATION MANAGER QUESTIONS These questions are appropriate for the first interview of a potential Records and Information Manager. 6 Pages (20-019)

RECORDS SUPERVISOR 2ND INTERVIEW These questions are designed for the second interview of a potential Records Supervisor. 1 Page (20-018)

RECORDS SUPERVISOR 1ST INTERVIEW These questions are designed for the first interview of a potential Records Supervisor. 2 Pages (20-017)

SENIOR IT PROGRAM / PROJECT MANAGER INTERVIEW The following questions are designed to help determine the qualifications of an individual applying for a Senior IT Program or Project Manager position. 6 Pages (50-275)

Management & Leadership

SWOT ANALYSIS TEMPLATE The information gathered from business leader feedback is used to guide our One-Page Strategy. 1 Page (20-876)

GOVERNANCE INFORMATIONAL BRIEF This template provides a format for creating your own executive leadership team governance brief. 2 Pages (20-552)

MANAGEMENT DEVELOPMENT This describes courses for transitioning to management, including challenges, meeting expectations, delegating, interviewing, and hiring. 6 Pages (20-529)

MANAGER EVALUATION WORKSHEET Provided here is a way for employees and management to be evaluated in terms of their traits. 2 Pages (20-528)

MANAGER TRAITS WORKSHEET Self-evaluation and peer evaluation are valuable ways of learning what traits are essential for great management. These rating systems provide a way to determine useful qualities. 3 Pages (20-527)

MANAGING AN AGE-DIVERSE WORKFORCE Given at the 2018 NOREX International Roundtable, this presentation explores the challenges of an age-diverse workforce and providing excellent management for all. 13 Pages (20-475)

LEADERSHIP COMPETENCY MODEL Critical thinking and innovation are examples of types of leadership examined in this model, including strategy, organizational, and team leadership. 15 Pages (20-442)

LEADERSHIP TURNING POINTS Leadership skills are defined, comparing individual contributor, specialist, people leader, manager, and senior leadership. 3 Pages (20-441)

New Employee

ONBOARDING REQUEST FORM This form is used to determine and chart accounts and equipment provisioning for new hires. 3 Pages (20-1164)

NEW EMPLOYEE SURVEY This survey evaluates the orientation processes for new hires. 3 Pages (20-1152)

ONBOARDING WORKFLOW This chart displays processes involved in onboarding a new employee. 1 Page (20-1151)

IT ONBOARD PROCESS New employee hiring, prep, setup, and training is outlined in this procedure template. 2 Pages (20-1150)

IT ONBOARDING PROCESS This is a general overview of hiring, prep work, and training processes for IT employees. 2 Pages (20-1148)

ONBOARDING PROCESS WORKFLOW This chart shows a new employee onboarding process through various departments of the company. 1 Page (20-1147)

EMPLOYEE ONBOARDING PROCESS This document lists current new employee onboarding processes and describes future changes for a work-from-home environment. 2 Pages (20-935)

EMPLOYEE ONBOARDING PROCEDURE The following onboarding packet walks the team through the first day on the job to probationary review. It includes helpful checklists and acknowledgment. 9 Pages (20-638)

END USER WELCOME KIT This document guides a new team member in setting up various programs and getting connected with frequently-used resources such as the Help Desk. 2 Pages (20-171)

Organization Charts

ERP DIVISION ORG CHART This chart is a detailed outline of an Enterprise Resource Planning division. 1 Page (20-1244)

SUPPORT AND OPERATIONS ORG CHART This chart outlines security, technology, and service desk operations flow. 2 Pages (20-1163)

SAMPLE IT ORG CHART This chart is a sample of one organization's IT department structure. 1 Page (20-1160)

IT AND INNOVATION ORG CHART The organization of an Information Technology and Innovation department is shown on this chart. 1 Page (20-1159)

IT ORGANIZATION CHARTS The following charts show examples of a global IT department and its categories. 4 Pages (20-1141)

ENTERPRISE ORG CHART This chart displays an example of an enterprise-wide technology and IT department. 1 Page (20-1061)

BUSINESS CAPABILITY ENVIRONMENT OVERVIEW This presentation describes a BCE steering committee structure and overall support model. 7 Pages (20-1057)

INFORMATION SECURITY ORGANIZATION STRUCTURE Following a chart of IS organization is a detailed description of the allocation of information security responsibilities. 5 Pages (20-615)

IT ORGANIZATIONAL CHART This template shows the flow of library, information technology, and marketing services within an organization. 1 Page (20-504)

IT ORGANIZATION PLAN Changes in IT organization from current to following year, summer plan, long-term plan, and function based development teams are charted in this presentation. 8 Pages (20-345)

PROJECT ORGANIZATION CHART This chart shows typical organization for business systems or information systems projects between project core team, project team, and stakeholders. 1 Page (20-344)

PROJECT MANAGEMENT FLOWCHART This flowchart template is an example of the disbursement of responsibility within the IT department. 1 Page (20-327)

ERP ORGANIZATION CHART This chart breaks down the hierarchy of the Enterprise Resource Planning division of the IT department. 1 Page (20-313)

IT ORGANIZATION CHART This chart displays the many levels of operation within the Information Technology department. 1 Page (20-312)

IT ORGANIZATION CHART This is an example of an organization of various positions in an IT department. 1 Page (20-108)

ENTERPRISE ARCHITECTURE ORG CHART This example shows the hierarchy of an Enterprise Architecture team. 1 Page (50-413)

SOFTWARE DEVELOPMENT ORG CHART Organization of software development teams are shown in this example chart. 1 Page (50-288)

DEVOPS ORG CHART This organization chart is an example of a setup in a DevOps environment. 1 Page (50-279)

Performance Management

REQUIREMENTS MATRIX This spreadsheet gives steps for a performance management process including goals and functionality. 2 Pages (20-550)

PERFORMANCE MANAGEMENT HANDBOOK This handbook illustrates the performance management cycle and the linkage of strategic planning, performance measurement, budgeting, performance review, and plan revision. 53 Pages (20-549)

PERFORMANCE MANAGEMENT FORM Goals and objectives for employees are outlined using this form, and the employee has the opportunity to perform self-assessment of various competency levels. 5 Pages (20-440)

CURRENT CAREER ISSUES WORKSHEET This worksheet includes statements that reflect the career issues people face so they can develop an effective strategy for managing them. 2 Pages (50-344)

Policies & Procedures

FACILITY MOVE PROJECT TRACKER All of the tasks involved in a full facility move are detailed in this sample template, including status, vendors, cost estimates, and other categories. 3 Pages (20-1192)

FACILITY MOVE TIMELINE AND FAQ This is a sample of an organization's facility move timeline, presented in calendar form, along with frequently asked questions about the move. 4 Pages (20-1191)

ALTERNATE WORK SCHEDULE The following is a voluntary alternative work schedule template. 4 Pages (20-1097)

IT BUDGET CODING This spreadsheet displays a way to code various elements of an IT budget, including salaries, office equipment, communications, vehicle expenses, and others. 2 Pages (20-650)

OVERTIME POLICY This is an example of one company's overtime pay policy, including requirements and eligibility. 1 Page (20-565)

ALTERNATIVE WORK ARRANGEMENTS Alternative work arrangements can reduce traffic congestion during peak periods, reduce commute trips, increase productivity, and/or provide personal benefit to

employees to balance work and home life needs. 8 Pages (20-563)

ON-CALL POLICY Procedures for authorizing, assigning, and compensating on-call duty are defined in this policy. 2 Pages (20-562)

ADA COMPLIANCE & ACCOMMODATIONS The Americans with Disabilities Act (ADA) provides equal access & protection for persons with disabilities. Policy detail for the workplace is provided here. 2 Pages (20-522)

PEST ANALYSIS TEMPLATE PEST (Political Economic, Social, and Technological) analysis assesses a market, including competitors, from the standpoint of a particular proposition or a business. 1 Page (20-431)

CODE OF CONDUCT POLICY Employees will be expected to adhere to the ethical and acceptable standards of conduct set forth in this policy to ensure that the company operates professionally and safely. 6 Pages (20-414)

RESPECTFUL WORKPLACE POLICY This policy is designed to ensure that employees work in a respectful workplace, free of bullying, harassment, discrimination, and violence. 7 Pages (20-398)

AMENITY & SERVICES PAYMENT PROCEDURES The hotel industry is linked to several others, such as gift shops, spas, and athletic clubs. The following are procedures for accepting payment for these types of services. 14 Pages (20-286)

HOSPITALITY PAYMENT PROCEDURES In a hotel / motel industry, the following procedures are taken when accepting a credit card as payment. 6 Pages (20-285)

VISUAL STYLE GUIDE This document is brought to you in its original form and has not been cleansed of personal information. This was done at the request of, and with permission from, the contributing organization. The style guide provides a comprehensive foundation of graphic standards for proper presentation of visual identity. 80 Pages (20-242)

CORPORATE EXPENSE GUIDELINES This document provides guidelines and establishes procedures for all associates incurring out of pocket expenses for the benefit of the company. 11 Pages (50-268)

RFP & Contracts

RFP: TALENT MANAGEMENT SYSTEM An organization is looking for a system focused on performance management, professional development, and succession planning for team growth. 27 Pages (20-869)

RFP: MULTIFUNCTIONAL DEVICES An organization seeks proposals for multifunctional devices for use in the copy center. Outlined are desired capabilities as well as supplier requirements. 25 Pages (20-743)

VENDOR SCORECARD QUESTIONS Initial questions and electronic requirements are covered in this vendor scorecard for HR & Payroll solutions. 13 Pages (20-716)

RFP: INSTRUCTIONAL DEVICE PROCUREMENT Proposals are solicited for vendors to provide instructional devices and related services for school districts and the education industry. 43 Pages (20-464)

RFP: CUSTOMER LOYALTY STRATEGY An organization requests proposals for a customer loyalty plan to develop strategy for customer recognition, engagement, and loyalty. 12 Pages (20-445)

RFP: ENVIRONMENTAL HEALTH PERMIT & INSPECTION MANAGEMENT SYSTEM (EHPIMS) This is a request for qualified organization who can provide a commercial, web-accessible, off-the-shelf Environmental Health Permit and Inspection Management System software solution to transition the company from paper-

based processes to electronically-based processes. 45 Pages (20-122)

Staffing

ERP STAFFING MATRIX This worksheet displays Enterprise Resource Planning staff responsibilities. 1 Page (20-961)

IT JOB FAMILY SUMMARY These descriptions show the differences between job levels for IT analysts and specialists. 3 Pages (20-693)

IT JOB COMPETENCIES This comprehensive list of IT jobs and responsibilities is broken down using efficiency and expertise levels ranging from "basic" up to the level of "strategist". 23 Pages (20-274)

CORPORATE IT CAREER PATH MODEL This IT Career Path Model has two main concentrations of job paths and competencies: Application Delivery and Infrastructure Delivery. 17 Pages (20-273)

IT CAREER PATH COMPETENCIES Typical IT competencies for systems & processes, technical & infrastructure delivery, and their certifications are indexed. 3 Pages (20-272)

IT CAREER PATH MODEL These flow charts represent CAD, GIT, and GID career paths. Included also is a job stack showing business & professional competency levels. 3 Pages (20-271)

JOB DESCRIPTION TEMPLATE This template describes the essential functions of a position and gathers information to identify both common and unique requirements for all positions throughout the company. 8 Pages (20-170)

IT ROLES & RESPONSIBILITIES This is a brief overview of what owners, stakeholders, support staff, and impact analysis participants are responsible for. 1 Page (20-001)

SUCCESSION PLAN CHART This chart organizes a general plan for employee position succession. 1 Page (50-396)

WOMEN IN IT CHARTER This presentation explains the evolution of a more defined roadmap to providing opportunities for women in the IT industry. 4 Pages (50-295)

JOB DESCRIPTIONS Job Descriptions in NOREX peer contributed document repository. 13 Pages (TK010)

Training & Development

SKILLS INVENTORY WORKSHEET This questionnaire has IT personnel identify proficiency levels in several areas. 5 Pages (20-933)

NEW USER PROVISIONING DIAGRAM This workflow diagram shows the process a new user would follow for service desk, training, and security. 1 Page (20-865)

LEARNING SHAREPOINT: MEMBER PERSPECTIVES A member shares learning notes and links for obtaining SharePoint tips and instructions. 9 Pages (20-694)

SECURITY TIPS: MEMBER PERSPECTIVES Following are tips a NOREX member has shared regarding experiences with security awareness and resources. 2 Pages (20-614)

SECURITY AWARENESS TRAINING POLICY The information security awareness program ensures that all employees achieve and maintain at least a basic level of understanding of information security matters, ethics,

and acceptable behavior. 3 Pages (20-603)

TRAINING REIMBURSEMENT AGREEMENT This agreement describes the rates of reimbursement for short and long term absences. 1 Page (20-494)

DEVELOPMENT REIMBURSEMENT The following agreement outlines reimbursement requirements for professional development and certification coursework expenses. 1 Page (20-493)

ONEDRIVE ADVANCE DOCUMENT LIBRARY SKILLS FOR SUCCESS The goal is to create an agenda to ensure that the communications / training plan introduces the user to key skills for managing document libraries. 2 Pages (20-262)

INDIVIDUAL DEVELOPMENT TEMPLATE This template records, short to long term goals, learning & development activities, and success measures. 1 Page (20-261)

INDIVIDUAL DEVELOPMENT PLAN This worksheet surveys professional and personal goals, strengths, and weaknesses as they relate to the workplace. 2 Pages (20-260)

TRAINING TEMPLATE The following is a loose training schedule template for a Help Desk employee. 2 Pages (20-165)

PHONE ETIQUETTE Often a client's first contact with a business is by phone. The following guidelines will help to make the first impression a good one. 5 Pages (20-150)

SOCIAL MEDIA POLICY TRAINING Tips on how to share and engage in Social Media, demographics, and working with agency (or company) accounts. 21 Pages (20-137)

DATA CENTER ACADEMY COURSES This is an example of a data literacy program, listing appropriate courses and timeline. 69 Pages (50-405)

DATA LITERACY PROGRAM This presentation outlines the data literacy program, the team members involved, their roles, and education tracks. 5 Pages (50-404)

INDIVIDUAL DEVELOPMENT PLAN This document provides a way to track your career objectives and development action plan. 2 Pages (50-346)

PREPARING TO DRAFT AN IDP This document includes questions employees should consider before drafting an Individual Development Plan (IDP). 2 Pages (50-345)

Travel

INTERIM TRAVEL POLICY This policy, created during the COVID-19 pandemic, provides guidance for business travelers to limit exposure and risk. 2 Pages (20-914)

FOREIGN TRAVEL STANDARD An organization shares a travel policy that helps prepare for international business travel procedures. 2 Pages (20-867)

BUSINESS & TRAVEL EXPENSE POLICY This describes company policy on submission of expenses for reimbursement. 3 Pages (20-466)

TRAVEL POLICY To be used in conjunction with a company travel guideline policy, this policy describes the planning, submission, and approval of travel expenses incurred while traveling on official company business. 10 Pages (20-452)

TRAVEL GUIDELINES The following guidelines are for the planning & approval of travel expenses and to ensure the expenses are appropriately reviewed, approved, and reimbursed. 2 Pages (20-451)

MILEAGE CLAIM FORM This mileage claim form may be tailored to suit the needs of your organization. 2 Pages (20-033)

MILEAGE CLAIM RETURN CHECKLIST This form is used to communicate reasoning behind the return of a mileage reimbursement request. 1 Page (20-032)

MILEAGE REIMBURSEMENT FORM This certification is for the proposed reimbursement of mileage used for business purposes. 2 Pages (20-031)

EMPLOYEE TRAVEL PROTOCOL In response to recommendations by the World Health Organization (WHO) and the U.S. Centers for Disease Control and Prevention (CDC), in addition to recent guidance from government officials, updates have been made to this Travel and Visitors Policy. 2 Pages (50-333)

VENDOR TRAVEL POLICY This policy applies to all vendors, consultants, and contractors traveling on behalf of the company or its subsidiaries. Vendors are required to comply with this policy when requesting incurred reimbursable travel expenses as permitted by a contract. 1 Page (50-269)

CORPORATE TRAVEL GUIDELINES This guide gives associates a clear and consistent understanding of expectations and procedures for corporate travel and expenses, while maximizing the company's ability to negotiate discounted rates with preferred suppliers and reduce travel spend. 11 Pages (50-267)

Videoconferencing

AUDIO / VISUAL DESIGN STANDARDS This standard describes how systems, pathways, back boxes, cabling, and equipment shall be included in the design of each project. 9 Pages (20-1232)

HYBRID VIDEOCONFERENCE GUIDELINES An organization shares their guidelines for video meetings with remote and on-site staff. 1 Page (20-1217)

SETTING UP A FREE ZOOM ACCOUNT Instructions for signing up for a free videoconferencing account through Zoom including tips for activation. 7 Pages (20-1076)

TEN TIPS FOR CONDUCTING VIDEO MEETINGS This document provides useful tips for healthcare professionals conducting patient visits via videoconference. 2 Pages (20-1029)

ZOOM MEETING BEST PRACTICES Etiquette and best practices are outlined in this document for participants and hosts of videoconferences. 1 Page (20-1028)

REMOTE VIDEOCONFERENCE BEST PRACTICES Tips for participants and for meeting organizers while videoconferencing from remote workstations at home. 1 Page (20-896)

VIDEO CONFERENCING TROUBLESHOOTING With staff working remotely, video conference sessions are becoming a more common occurrence. Because each person's internet access at home can be different and their experience with video conferencing varies, below you'll find some troubleshooting guidance and tips. 2 Pages (20-892)

VIDEO MEETINGS BEST PRACTICES Here are a few simple camera and audio tips to make your video conferencing experience successful. Specific tips on Google Hangouts are included. 1 Page (20-891)

VIDEO SECURITY SYSTEMS STANDARDS AND GUIDELINES In order to provide all employees a safe and secure working area, this company supports the implementation of Video Security Systems that include a specific set of coverage areas in all facilities. 5 Pages (20-767)

VIDEO RETENTION & DISTRIBUTION This administrative policy describes maintenance of video recordings on all modes and how such recordings are preserved, reviewed, and distributed. 9 Pages (20-649)

CLOSED CIRCUIT TV PROCEDURES The CCTV system is used to monitor public areas in order to deter crime, scan for safety concerns, and to assist in providing a secure environment. This document provides guidance for CCTV use. 7 Pages (20-648)

Work-From-Home / Telecommuting

FLEX WORK MODEL An organization shares their flex work model framework, outlining short, intermediate, and long-term outcomes. 1 Page (20-1251)

REMOTE WORK AGREEMENT This agreement template describes requirements and expectations of a remote work environment. 2 Pages (20-1112)

REMOTE WORK POLICY Remote work requirements such as hours, eligibility, approval, and equipment are outlined in this policy. 2 Pages (20-1111)

REMOTE WORK CYBERSECURITY GUIDELINES This is a concise overview of cybersecurity guidelines in the COVID-19 era. 5 Pages (20-1074)

REMOTE OFFICE SAFETY CHECKLIST The following checklist helps assess the overall safety of your home workspace to determine what adjustments you may need to make. 1 Page (20-1073)

REMOTE WORK ERGONOMICS This document shares tips for creating a workstation at your remote office that helps minimize fatigue and prevents injury. 1 Page (20-1072)

REMOTE WORK ENGAGEMENT TIPS Tips on how to help teleworkers stay engaged and build community with coworkers are listed in this document. 3 Pages (20-1071)

MANAGING REMOTE WORKFORCE Several tips for creating and maintaining good communication with a remote workforce are shared. 2 Pages (20-1070)

EQUIPMENT CHECKOUT POLICY This document outlines policy for use of company equipment, tools, computers, or other property while working from a remote location. 3 Pages (20-1054)

TEMPORARY TELECOMMUTING POLICY This policy outlines provisions and regulations for employees who need to work remotely on a temporary basis. 1 Page (20-985)

TELECOMMUTING AGREEMENT This agreement lists employee and company expectations and provision of equipment for employees working remotely. 3 Pages (20-984)

COLLEGE WORK-FROM-HOME PROCEDURES This document describes procedures for a staggered workforce of college employees working on campus and remotely. 3 Pages (20-967)

WORK-FROM-HOME SURVEY Using this survey, personnel can communicate successes and failures working remotely during the COVID-19 pandemic and can express their preferences on returning to the office. 6 Pages (20-934)

VIDEO CONFERENCING TROUBLESHOOTING With staff working remotely, video conference sessions are becoming a more common occurrence. Because each person's internet access at home can be different and their experience with video conferencing varies, this document will be helpful for troubleshooting guidance and tips. 2 Pages (20-892)

VIDEO MEETINGS BEST PRACTICES This document includes a few simple camera and audio tips to make your video conferencing experience successful. Specific tips on Google Hangouts are included. 1 Page (20-891)

SAMPLE TELEWORK RESOURCES FAQ This list of Frequently Asked Questions was developed to assist divisions in their telework planning purposes. 2 Pages (20-885)

TELECOMMUTING AGREEMENT This is an example of a telecommuting agreement between supervisors and the potential telecommuter. 3 Pages (20-840)

FLEXIBLE WORK POLICY This document will highlight three types of flexible work arrangements. 4 Pages (20-825)

IT TELECOMMUTER NORMS These norms are expectations set for employees in addition to a telecommuting policy. 2 Pages (20-824)

FLEX OR WORK-FROM-HOME PROGRAM This document explains one organization's flexible Work-From-Home (WFH) program, including eligibility and options. 4 Pages (20-814)

ALTERNATIVE WORK LOCATION AGREEMENT This agreement details an employee's Work-From-Home (WFH) arrangement with the employer. 1 Page (20-813)

FLEXPLACE PROPOSAL This worksheet will help you think about your potential flexible work arrangement and develop your proposal. 3 Pages (20-759)

FLEXPLACE OR WORK-FROM-HOME ASSESSMENT Is Flexplace or Full Time Work-From-Home (WFH) a viable option for you to consider? Complete this assessment to learn how your role, work style, and personality may impact your success. 3 Pages (20-758)

FLEXPLACE AGREEMENT The following constitutes the terms and conditions of the Flexplace agreement, a Work-From-Home option. 3 Pages (20-757)

REMOTE WORK POLICY This policy provides employees with the standards and procedures related to a remote work arrangement. 5 Pages (20-756)

TELECOMMUTING REQUEST FORM The following form can be used by employees who would like to request a Work-From-Home (WFH) or telecommuting schedule. 1 Page (20-755)

TELECOMMUTING PROGRAM STANDARD This standard applies to all telecommuting personnel and can be used for guidance for employees and managers in defining other alternative work arrangements. 4 Pages (20-754)

ALTERNATIVE WORK ARRANGEMENTS Alternative work arrangements can reduce traffic congestion during peak periods, reduce commute trips, increase productivity, and/or provide personal benefit to employees to balance work and home life needs. 8 Pages (20-563)

FLEXIBLE WORK AGREEMENT This agreement documents the IT Department's flexible work arrangements with exempt professional staff that are working offsite one day a week on a regular schedule. 2 Pages (20-521)

REMOTE OFFICE STIPEND POLICY 3 Pages (20-389)

SUPERVISOR TELECOMMUTING HANDBOOK Supervision of telecommuters brings additional challenges with fostering teamwork, monitoring, and measuring performance. 8 Pages (20-309)

TELECOMMUTER HANDBOOK Work schedules, ergonomics, workplace culture, and administrative issues of telecommuting are included in this handbook. 5 Pages (20-308)

TELECOMMUTING POLICY Policy and guidelines of telecommuting describe how to improve staff efficiency without compromising productivity. 7 Pages (20-307)

TELECOMMUTING POLICY OVERVIEW Outlined in this policy are telecommuting expectations, equipment, hours of work, eligibility, and more. 2 Pages (20-306)

WORK-FROM-HOME AGREEMENT This agreement documents the IT Department's flexible work arrangements with exempt professional staff that are working offsite one day a week on a regular schedule. 2 Pages (20-268)

IT TELECOMMUTING POLICY This document defines guidelines surrounding telecommuting in the IT Department and defines which positions are candidates for an alternate work environment. 3 Pages (20-154)

WORK-FROM-HOME POLICY The Work-From-Home program provides a voluntary work alternative while ensuring it is beneficial to both staff and employer. 4 Pages (50-364)

WORK-FROM-HOME BEST PRACTICES The following guidelines explain how to ensure your home network and computer systems are secure. 1 Page (50-363)

FLEXPLACE POLICY Various forms of a successful remote work arrangement are explained and referenced in this policy. 5 Pages (50-306)

FLEXPLACE SAFETY CHECKLIST The following checklist is recommended for use in organizing an alternate work site as part of a Flexplace or Work-From-Home program. 2 Pages (50-305)

FLEXPLACE AGREEMENT This agreement is an overview of the arrangement and expectations involved in a Flexplace or Work-From-Home (WFH) program. 2 Pages (50-304)

FLEXPLACE REQUEST FORM This form is useful for those who wish to request consideration for a Flexplace or Work-From-Home program. 2 Pages (50-303)

FLEXPLACE ASSESSMENT FORM Determine whether your employees are a good fit for Flexplace or WFH (Work-From-Home) positions using this form. 2 Pages (50-302)

Transcripts & Polls

EMPLOYEE ONBOARDING / OFFBOARDING TRANSCRIPT NOREX Members discussed the four Cs of onboarding – Compliance, Clarification, Culture, and Connection; day-one training; credentials to access corporate systems on start day or earlier; SLA for creating starters; ITSM Salesforce ticket system; process to determine access to applications / systems; initiating sub-processes that include other groups / departments; tracking assets manually or with an automation tool; best practices for deploying and retrieving IT equipment; cached credentials; tools used for a centralized employee repository; and tracking setup. 22 Pages (NV2455)

HEALTHCARE INDUSTRY IT SECURITY TRANSCRIPT NOREX Members discussed when risk outweighs an operational mandate; managing comprehensive security; successful tool and processes for centralized or almost-centralized security management; state of cybersecurity infrastructure; routine tests to measure cybersecurity readiness; managing outside access requests such as VPN connections, vendor contract workers, etc.; Cloud-hosted EMRs; responding to natural disasters or other emergencies; and best practices for recruiting and retaining talent. 14 Pages (NV2447)

RISK & VULNERABILITY MANAGEMENT TRANSCRIPT NOREX Members discussed conducting a formal vulnerability assessment; prioritizing which aspects of Risk / Vulnerability Management to be managed internally vs contracted out to a MSS vendor; mitigating human resources risk; reporting to executives / application owners; communicating risk to decision makers; policy to patch zero-day, critical, high, medium, or low vulnerabilities; dynamic Asset Management tools; processes used to discover and track vulnerabilities in IT

systems; and measuring progress on remediating vulnerabilities. 21 Pages (NV2422)

TALENT RECRUITMENT / MANAGEMENT / RETENTION TRANSCRIPT NOREX Members discussed top-shelf benefits today's IT candidates expect, strategies implemented to retain current talent, challenges with pushing IT employees to return to the office, available hybrid / work-from-home / in-office options, creating bonus programs, targeting and hiring talent that is a cultural fit and has the required skill set, measuring technical knowledge vs what is listed on a resume, questions candidates ask about the hiring organization, promoting employee engagement, and creating a team atmosphere when many employees continue to work remotely. 18 Pages (NV2411)

EMPLOYEE ONBOARDING / OFFBOARDING TRANSCRIPT NOREX Members discussed the use of a single form or webpage for onboarding / offboarding, automation and technology deployment, best practices to be informed of new job titles / job codes, provision policies for AD accounts, enabling access in advance of a new-hire start date, assigning permission for different job titles, education of new users on their computers, length of time to onboard, processes around standard onboard training, UltiPro to work between UKG and Active Directory, and recovering hardware in offboarding. 37 Pages (NV2409)

CONSTRUCTION INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed PMO for IT, challenges with finding and retaining IT talent, internal vs outsourced onsite technical support, 5G connectivity, equipment used besides individual phones / tablets, WebDAV, WordPress for intranet, utilizing interactive, large-format displays such as the Dell 55" on jobsites, and security cameras used onsite. 21 Pages (NV2408)

TRANSPORTATION INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed the shortage of drivers, issues with finding and retaining IT workers, addressing cybersecurity risk, types of digital investments being made, managing the 3G February / March sunset dates and asset tracking, implementing Snowflake for a data warehouse solution using Azure Data Factory for ELT / ETL, solutions for source control, data dictionary, glossary of terms while following DevOps best practices, and increased infrastructure and maintenance costs. 16 Pages (NV2403)

IAM: AUTHENTICATION & SECURITY TRANSCRIPT NOREX Members discussed how best to start an IAM implementation, timeframe of implementation, major issues encountered / lessons learned, products commonly assessed and selected, Data Loss Prevention (DLP) and Information Rights Management (IRM) tools in Office 365, desktop / Windows-installed solutions for MFA, implementing MFA for on-prem AD, MFA products recommended for remote access to network, adopting a zero trust model, and staffing to manage the IAM solution implemented. 23 Pages (NV2400)

HEALTHCARE INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed selling IT as business value, techniques to assure IT is part of Clinical Operations future planning, IT as the unofficial project management department, IT salary comparisons, leveraging Cures Act Interoperability and planning for the Transparency and No Surprises Act, cybersecurity metrics for board presentation, HIPPA compliance, and data retention policies. 17 Pages (NV2395)

EMPLOYEE ONBOARDING / OFFBOARDING TRANSCRIPT NOREX Members discussed ownership of the new-hire onboarding process, metrics used to measure success, onboarding in a group setting, issues with remote and international employee onboarding / offboarding, hardware distribution and returns, manual and automating on / offboarding for access management, and lead time for tickets. 22 Pages (NV2388)

POST-COVID HYBRID WORK STRATEGIES TRANSCRIPT NOREX Members discussed how best to manage a hybrid work environment, provisions for home offices, hardware support and budget, internet connectivity issues, cash allowances and potential legal concerns, achieving equity amongst in-office and at-home staff, best tools for building out conference rooms, and security. 30 Pages (NV2385)

WOMEN IN IT TRANSCRIPT NOREX Members discussed how to discover talented women interested in IT opportunities at an early age, community outreach to encourage more women in STEM careers, internship programs, trends for women in the workplace, internal progression opportunities, overcoming challenges with

the parent trap and returning to the office, and instilling confidence and gaining respect from male counterparts. 26 Pages (NV2378)

HELP DESK / SERVICE DESK TRANSCRIPT NOREX Members discussed the organization and approach to help desk / service desk and its structure, self-help options for end-users, outsourcing, and the collection of metrics. 19 Pages (NV2372)

MICROSOFT TEAMS BEST PRACTICES TRANSCRIPT NOREX Members discussed the implementation of Microsoft Teams within an organization, Teams' members as part of the infrastructure or collaboration teams, the use of the exploratory license program, promoting adoption and usage of the platform, and VoIP integrations. 49 Pages (NV2369)

TELECOM / VOIP / TEAMS PHONE SYSTEMS TRANSCRIPT A great March, 2021 discussion on telecom trends. Strategies and experiences moving to Teams (and others) for voice; softphones comparison; VoIP enhancements; and more. This transcript includes several polls and a lively chat session. 32 Pages (NV2361)

WOMEN IN IT TRANSCRIPT IT historically, and still today, is a male dominated field. Women in IT continue to face bias, conscious and unconscious, identity challenges, and lack of recognition for the unique skillsets they bring to this environment. This robust discussion includes really good ideas for strengthening your network, supporting efforts to build a stronger female workforce, and really candid discussions around being unapologetically female in your role. 22 Pages (NV2359)

PLANNING FOR 2021 TRANSCRIPT NOREX members share their expectations for IT budgets, staffing levels, security initiatives, user support trends and other 2021 issues during this December 2020 session. 19 Pages (NV2351)

MANAGING AND MONITORING REMOTE TEAMS TRANSCRIPT NOREX Members share policies, procedures and tools for managing and monitoring remote workers during this August 2020 WebForum. 20 Pages (NV2339)

WOMEN IN IT TRANSCRIPT This August, 2020 inaugural Women in IT discussion brought together female IT leaders from diverse companies across North America for a frank and honest discussion on the challenges and rewards of being a woman in a traditionally male dominated industry. 23 Pages (NV2335)

ASSET MANAGEMENT / PROCUREMENT FOLLOWING COVID-19 TRANSCRIPT NOREX Members discuss ITAM strategies and tools in light of the COVID-19 Pandemic during this May 2020 WebForum. 20 Pages (NV2323)

COVID-19: BRINGING WORKFORCE BACK TRANSCRIPT Organizations are currently working on how and when to move staff back to the office after the COVID-19 pandemic shutdown. Among the decisions to be made are whether to return the full or partial staff to the office. During this WebForum, NOREX Members and guests discussed options, resources, and lessons learned regarding equipment returns, social distancing in the office, government requirements and guidelines, stipends for employees, work prioritization, remote work tools, sanitizing, restrictions, and temperature scanning in the workplace. This transcript includes discussion about keeping the workforce safe after returning to the office, as well as a robust chat log conversation. 53 Pages (NV2321)

COVID-19 PANDEMIC: RESPONSE, LESSONS LEARNED, WHAT'S NEXT? TRANSCRIPT Members discuss how the organization has responded to the impact to the pandemic crisis. Lessons learned on supporting WFH from a technical, hardware, security and team engagement / collaboration, and what is next perspective are shared. Polls, links, and a lively chat section are included in this April, 2020 transcript. 28 Pages (NV2315)

PREPARATION FOR A REMOTE WORKFORCE TRANSCRIPT With the onset of COVID-19 and the need for distancing, aggressive remote workforce processes are in place for most NOREX Member organizations. NOREX hosted this discussion on March 17, 2020 with over 200 participants. This transcript includes a very

active chat log conversation, results from polls taken, and the takeaways we received from those who completed an evaluation. 48 Pages (NV2313)

EMPLOYEE ONBOARD / OFFBOARD IT ISSUES TRANSCRIPT What is the corporate lead time to setup new accounts? Who is responsible for opening onboarding tickets; training; off boarding best practices and the solutions / tools to assist with automation are included in this discussion. Polls, a lively chat and BYOD / MDM best practices are included in this March 2020 transcript. 30 Pages (NV2309)

MICROSOFT TEAMS AND ALTERNATIVE SOLUTIONS TRANSCRIPT Microsoft Teams and alternative solutions is a strong, growing area of interest for many NOREX Members. This discussion covers adoption and implementation, benefits and shortfalls, use of chat and collaboration, developing MS Teams governance, and more. Polls, links and an in-depth chat section is included in this February 2020 transcript. 32 Pages (NV2308)

PANDEMIC CRISIS PREPAREDNESS TRANSCRIPT NOREX members discuss business continuity, disaster recovery and updated policies to prepare for the possibility of a pandemic. 12 Pages (NV2307)

WOMEN IN IT TRANSCRIPT This July, 2019 member presentation and discussion focuses on the promotion and advancement of women in IT. Effective ways to grow awareness and interest at the grade school age, higher education, internship and beyond. Also, links to professional IT training, organizations available, and reflection on the future growth for women in IT is included. 15 Pages (NV2279)

QUICK POLL RESULTS: IT STAFFING & BUDGETING 2022 In August 2022, 125 NOREX Member organizations responded to a poll regarding IT Staffing & Budgeting. Questions included IT staff size, 2022 IT budget as a percentage of overall budget, 2023 IT budget, salaries, and IT staff compared to 2022, IT staff percentage of overall staff size, end users supported, IT staff dedicated to cybersecurity, and Organization's total revenue. 4 Pages (NP2427)

QUICK POLL RESULTS: COVID-19: WORKFORCE NEXT STEPS In April 2020, over 200 NOREX members responded to a poll on workforce next steps in relation to the COVID-19 pandemic. Topics covered are when to bring employees back to the office, what measures will you deploy, and lessons learned and best practices implemented during the pandemic. 20 Pages (NP2319)

QUICK POLL RESULTS: WORK-FROM-HOME TRENDS In October 2019, 200 NOREX members responded to a poll on Work-From-Home trends. Questions covered organization's practices and policies on employees working from home. Key comments were given on what IT positions were allowed to work from home, when is it offered, what support employees receive and what benefits and negatives are seen from staff working from home. 14 Pages (NP2297)

IT TRENDS 2023 Q1 IT Trends is a collection of the NOREX Member input captured in the first quarter of 2023 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 45 Pages (DT2023-1)

IT TRENDS 2022 Q4 IT Trends is a collection of the NOREX Member input captured in the fourth quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 37 Pages (DT2022-4)

IT TRENDS 2022 Q3 IT Trends is a collection of the NOREX Member input captured in the third quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 44 Pages (DT2022-3)

IT TRENDS 2022 Q2 IT Trends is a collection of the NOREX Member input captured in the second quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 43 Pages (DT2022-2)

IT TRENDS: 2022 Q1 IT Trends is a collection of the NOREX Member input captured in the first quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 57 Pages (DT2022-1)

IT TRENDS: 2021 Q4 IT Trends is a collection of the NOREX Member input captured in the fourth quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 44 Pages (DT2021-4)

IT TRENDS: 2021 Q3 IT Trends is a collection of the NOREX Member input captured in the third quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 59 Pages (DT2021-3)

IT TRENDS: 2021 Q2 IT Trends is a collection of the NOREX Member input captured in the second quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 56 Pages (DT2021-2)

IT TRENDS: 2021 Q1 IT Trends is a collection of the NOREX Member input captured in the first quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 57 Pages (DT2021-1)

IT TRENDS: 2020 Q3 & Q4 IT Trends is a collection of the NOREX Member input captured in the third and fourth quarters of 2020 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 74 Pages (DT2020-2)

IT TRENDS: 2020 Q1 & Q2 IT Trends is a collection of the NOREX Member input captured in the first and second quarters of 2020 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 62 Pages (DT2020-1)

CIO: TALENT RECRUITMENT, MANAGEMENT, AND RETENTION TRANSCRIPT NOREX Members discussed how many days per week employees are allowed to work from home in a hybrid environment; evolution of hybrid work policies; metrics to demonstrate the value of work from home; succession planning and evaluation; bringing a legacy management team into the modern world; developing and retaining employees without overpaying talent; adjusting pay scales to incentivize employee retainment or attract new talent; and filling FTE to cover lower-skill SME requirements. 15 Pages (CV082)

CIO: IT STAFF DEVELOPMENT & PERFORMANCE TRANSCRIPT NOREX Members discussed Knowledge Skill Trees / Maps for application development and system infrastructure teams, reskilling / upskilling staff utilizing internal custom content or 3rd-party providers, preparing for Cloud / digital transformation, options for learning better human interactions and collaboration, IT Certification training and exams, motivating and retaining staff, and data to support that staff is productive and performing at a high level when working remotely. 20 Pages (CV079)

CIO: IT BUDGETING & PLANNING FOR 2022 TRANSCRIPT NOREX Members discussed projecting vendor price increases, cybersecurity goals aligning with legal and cyber insurance needs, percentage of IT budget to overall budget, success stories to acquire more funding and staff, the cost to move to the Cloud, software, infrastructure, and platforms when moving to the Cloud, leveraging ARPA funding in 2022, mid-year reviews to analyze spending, determining the optimal size for an IT organization, critical-success criteria, and measuring productivity of software developers in an Agile Scrum environment. 24 Pages (CV078)

CIO: TALENT RECRUITMENT, MANAGEMENT, AND RETENTION TRANSCRIPT Finding the right people for the right chairs is always a challenge. The pandemic has created interesting challenges and solutions in this new recruiting landscape. During this WebForum, CIOs discuss philosophies and solutions to building their teams. 15 Pages (CV077)

CIO: ROLE / JOB DESCRIPTION OF THE CIO TRANSCRIPT Senior IT leaders discuss the evolution of the Chief Information Officer role during this October 2020 session. 17 Pages (CV076)

CIO: IT'S ROLE IN BUSINESS SUCCESS TRANSCRIPT Senior IT leaders share strategies for aligning IT with business objectives during this July 2020 WebForum. Topics include cloud computing, staffing, project prioritization and Business Intelligence tool recommendations. 20 Pages (CV075)

CIO: NAVIGATING INTERNATIONAL / GLOBAL IT ISSUES DURING A PANDEMIC TRANSCRIPT During this CIO call, NOREX Members and guests shared experience and ideas on global office management, particularly in Asia. They discussed differences in products, regulations, firewalls, long distance connectivity, and collaboration tools. 21 Pages (CV074)

CIO: REMOTE WORKFORCE / WORK-FROM-HOME TRANSCRIPT The benefits and concerns of supporting a remote workforce and a work-from-home program are a hot topic for IT executives. In December 2019, NOREX members discuss experiences, recommendations, policy, tools to support, and general consideration when offering employee remote workforce / WFH programs. 26 Pages (CV073)

CIO IT TRANSFORMATION TRANSCRIPT This March 2019 session featured strategic-level discussion on starting the transformation process, gaining executive support, involving business units and developing roadmaps for cloud usage and mobile device management. 19 Pages (CV071)