

## Professional Oversight in a Virtual Environment – Considerations

### Purpose

The following practices are for consideration related to operating in a virtual environment that is becoming increasingly common place. Any use of this information is at the user's discretion and the Association of Ontario Land Surveyors or its committees and task forces take no responsibility or liability for its usage. It is up to survey firms to establish their own policies and directions.

### Client Communications

Please see the Business Communications Manual posted on the AOLS web site for additional detail.

Opportunities to meet with clients whether virtually or safely in person should continue to exist for project definition and kick off as well as hand over of deliverables and project close. These can take the form of virtual meetings such as Zoom or Skype.

There should be professional involvement in the meetings (i.e. an OLS) with the client or at the very least clarity from the OLS as to the role of the individual involved on behalf of the firm.

### Office Staff

Office staff may be working remotely. There should be file sharing capabilities such that the supervising OLS can review progress, calculations and drafting.

The file sharing processes require sufficient security and version control to ensure that files that are approved by the supervising OLS are not modified without their knowledge.

### Field Staff

Field staff need to be capturing sufficiently redundant data that the supervising OLS can ensure the quality of data being captured.

Field staff should be encouraged to photograph any unusual issues and evidence being relied upon to establish boundaries.

Field crews should be encouraged to perform regular calibration exercises on their equipment and share the results with the supervising OLS.

Safety conversations should be held regularly and at the start of any large project. These may be in the form of phone calls but if available can use virtual meeting technology on smart phones. Staff should always have contact capabilities with the office, particularly in remote areas, where satellite phones or SPOT units may be deployed.

### Other Consideration

#### Staff Experience

Staff experience plays a large role in the trust required to allow staff to work remotely with less supervision. More junior staff need more supervision and increased checks built into systems and

processes. Consideration should be given to comprehensive checks during early periods to ensure their work is meeting expected standards.

## Technology

Technology, and particularly communication technology, has improved dramatically over the last several years. In most of the populated areas of the province cell phone coverage exists allowing easy communications between staff and the supervising OLS. Staff should be encouraged to use this technology when in doubt of anything.

Firms should establish clear policies regarding the reimbursement of costs for Internet, additional home insurance, computer hardware and software and any other required technology.

Firms should establish clear policies regarding the return of all hardware, software and data in the event of the termination of employment, layoff, etc.

## Data Security

Data exchange between office and office staff in remote locations may be via direct Internet link, e-mail, 'cloud' sources, etc. Protocols should be established for:

- Protection of privileged client data (building plans, photos, etc.)
- Protection against data losses (duplicate files, etc.)
- Protection against computer viruses and hacking
- Elimination of data from personal computers at project completion
- Insurance or other issues related to losses in case of fire, burglary, etc.
- Rigorous file versioning (naming protocols) to avoid data losses and ensure that final file versions are used for the survey report to client

## Copyright

Firms should establish clear policies regarding the ownership and copyright of all materials produced for the company at the remote location.

*The law may be quite clear on this subject, but employees may be less clear in their minds about copyright of materials produced in their own homes. Clearly outlining the rules in company policies will provide clarity for everyone.*

## Insurance

Firms should determine and have clear policies on Insurance Issues:

- Are there any issues related to the AOLS Errors & Omissions Insurance (or a firm's private insurance)?
- Any issues with a Firm's Accident / Disability coverage for home offices. Would a fall or accident need to be covered by home insurance or the Firm's insurance? Does the employee need any additional home insurance by operating a 'home' office? *(Many home insurance policies have limited coverage for items not owned by the homeowner.)*

## Interactions

Staff are often the front-line contact with the public particularly with remote working operations. They are representing the supervising OLS and should act accordingly. They need to be properly instructed in dealing with the public (e.g. polite response, privacy consideration, problem escalation).

## Health and Safety

Health and safety policies should cover work at home situations including how oversight is provided. Examples might include workstation ergonomics, work station clutter, when employees are considered at work, incident reporting to name a few.