



# GUIDELINES FOR WORKING REMOTELY

Tamarack is a remote-based organization and we have developed these Guidelines to create a sense of understanding and awareness about what it means to work remotely. These Guidelines support our HR Policy.

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## Welcome to the club

Tamarack is committed to becoming one of the best remote-based organizations in Canada. Working at home or at an office within walking distance improves our quality of life and is a significant reason people love working at Tamarack. It is a privilege and a joint responsibility. All employees at Tamarack must have the ability to work remotely and it is a condition of employment at Tamarack.

It is not necessarily easy to work at Tamarack or with a dispersed workforce but neither is competing in sport at a high level or becoming the leader in a given field. It takes hard work, mutual accountability, dedication, patience, commitment and the right fit both from the organization's perspective and from the employee's perspective. We work at a dynamic and fast pace as we strive to be the leader in our field.

In order for remote-based organizations to work effectively, we need both a strong level of trust and also guidelines to support staff to reach their full potential. This Guide has been put together to celebrate the benefits of remote work, address the challenges and to provide guidelines for making remote work a successful and satisfying part of your life. Whether you plan to work from home, or in a space nearby, we hope this Guide helps you feel informed and inspired to integrate remote work into your life in a way that benefits yourself, your community, your colleagues, and Tamarack as a whole.

It is time to embrace remote work. Welcome to the club of early adopters!



## Why it's time to embrace remote work

While 'remote friendly' work places have grown in popularity in recent years, the shift to companies and organizations building fully remote work forces from inception is gaining momentum. Remote work is no longer viewed as a fringe benefit for a small group of employees, but a way of building a virtual team from the ground up.

Josh Bersin, who founded his research and analyst firm, Bersin, as a virtual company in 2002, notes that, *"organizations really aren't companies, they're like networks of teams. Even big companies are being reorganized like this. Everybody is working with a team that is somehow connected to another team, and that team may or may not be inside the company."*

Remote working is on the rise – that is for sure – here's why you should embrace it:

### Technology

The expectation that the best work happens between the hours of 9am - 5pm in a cubicle downtown a major city, is an ideal of the past. With advances in technology, we now have the ability to connect with colleagues globally; share computer screens; edit shared documents; and, have an ever-growing database of online communication tools at our disposal.

At Tamarack, we take advantage of all of these tools on a daily basis and provide a monthly stipend to support technology costs such as computers, internet and phones.

### Escape the city

Working remotely allows you to choose where you want to live based on your interests, relations and values. No longer are you bound to live in the busy hub of a city due to office commitments. Remote work supports you living where your community is strongest and where you can feel your best. That may be a busy city, or a rural town.

### Attract the best

As a Pan-Canadian organization, and increasingly supporting projects across the U.S. and beyond, working remotely allows Tamarack to hire the best for the job regardless of physical location. We have staff members who contribute to our mission from British Columbia to Ontario.

### Think of the environment

Because remote workers do not commute, don't use up space in a fully equipped office and tend to avoid paper documents, the net effect on the environment is extremely positive.

A study commissioned by Sun Microsystems pinpointed the daily commute to and from work as being responsible for more than 98 percent of an employee’s work-related carbon footprint. The same study also found that employees on average save more than \$1,700 per year in fuel and wear and tear on their vehicles when they work at home just 2.5 days a week.

**Say goodbye to the commute**

Studies show that workers regard their commute as a loss of wages, expense and a general negative aspect of their work. At Tamarack all employees work from home or within a walkable rented space within their communities, freeing up space and time to do things that matter to them. Plus, it makes people happier - did you know that commuting is associated with an increased risk of obesity, insomnia, stress, neck and back pain, high blood pressure, and other stress-related ills such as heart attacks and depression, and even divorce?

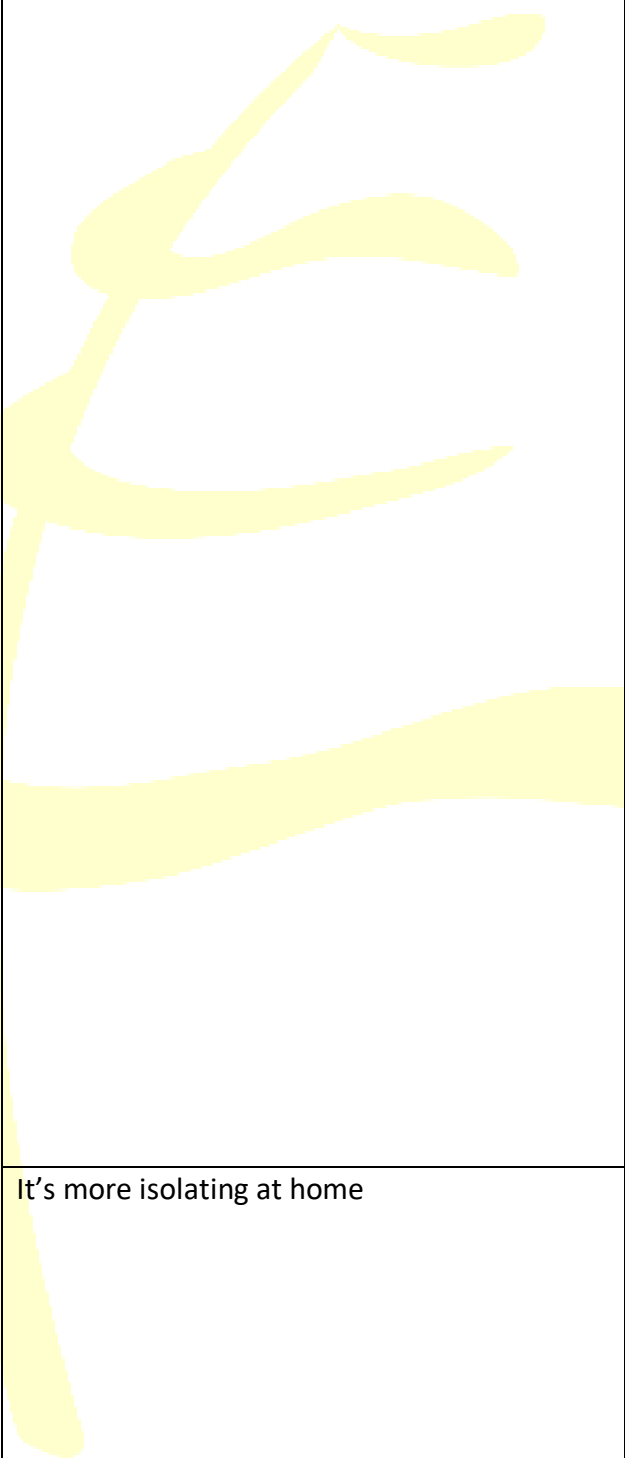
**Work-life balance**

Working from home allows for closer contact to family and friends, improved personal planning opportunities and customized working environments. Tamarack has flex and lieu time policies that help balance work commitments with life commitments like appointments, tending to sick children or family members and other important priorities that affect us all.

**Dealing with the Challenges**

With all of the benefits of working remotely come challenges and as an organization we are working every day to address these issues. Through conversations with Tamarack staff as well as other resources, we’ve put together the chart below to outline some of the challenges of remote work and steps to help overcome them.

Remote Challenge	Steps to Overcome
<b>Isolation</b>	
No ‘hang time’ with my colleagues	<p>Give yourself permission to chat a bit about non-work things on calls/meetings.</p> <p>Read and participate in Monday Check Ins. Every Monday the staff in the Learning Centre provide a short update on their weekend and outlines priorities for the coming week on Sharepoint. This is an important tool to learn about each other and stay updated with each other’s lives and work priorities.</p>

	<p>Every Monday within Vibrant Communities, the CRP and CDC team meet separately over Zoom to go through the same weekend check in's, and goals, accomplishments from the week prior and priorities for the coming week.</p> <p>The entire VC team meets on Wednesday to go over membership updates, policies and creative.</p> <p>Be an active participant in Tuesday's at 11. For one hour on Tuesday mornings, all staff meet on a one-hour video conference call to go over high-level updates and announcements from LC, VC, Finance, HR and Operations. Friday's thirty-minute call is a chance to share knowledge within the team. Each Friday, a staff member will give a short presentation about something they feel comfortable sharing or are responsible for in their roles.</p> <p>All of these SharePoint updates and video conference meetings are a chance to connect, ask for advice and share ideas with one another.</p> <p>Take advantage of in-person events and All Team Meetings. This is a great time to get to know each other better in person and build relationships that will carry through once back at home.</p>
<p>It's more isolating at home</p>	<p>Working remotely, doesn't necessarily mean working from home. If you find working from home too isolating, look into renting a space near your house as another option. Tamarack will work with you to find a work environment that is right for you and allows you to do your best work.</p> <p>Don't feel strapped to your desk. Get creative and bring your workplace to a café for the</p>

	<p>afternoon, visit a nearby library or plan to work with a friend or neighbour for the day.</p>
<p>Trust</p>	
<p>Developing a strong relationship of trust on the team</p>	<p>Trust is a fundamental part of remote work. Not being in a physical space together can lead to misperceptions and miscommunications regarding work. Communicate clearly with your colleagues, establish relationships of trust early and let your work speak for itself. In a remote environment, your work is a measuring stick of your performance and will help you build trust when executed successfully.</p> <p>Work to reconcile trust issues head on before they turn into a problem. Create an open stream of communication with your direct report so that if trust is 'bruised' or in question it can be communicated and re-established before it is 'broken' and in need of disciplinary action.</p>
<p>Validation – knowing if what I am doing is up to par/standard</p>	<p>Establish a check-in process with your team on a regular basis. Communicate progress, challenges and set priorities. Use this time to ask clarifying questions and to check in on work completed.</p> <p>As a new staff member you will be given a mentor who will help you navigate the system during your first few months on board. Use this mentor as a resource to ask questions or voice concerns early on so you can find your voice and work rhythm early.</p> <p>At Tamarack we have a three-month, six-month and one-year review within your first year. This will be another opportunity to check in on your work performance and discuss paths to improvement.</p>

<b>Distractions</b>	
Hard to concentrate when other family members are home or when kids get home from school	Set boundaries with family members. Close the office door and let them know that when the door is shut you are not available. You must work together with your family to build a mutual understanding of your work space and how that is treated and respected.
Children in the house for snow days, sick days, etc.	At Tamarack we have dedicated <b>Care Days</b> and a <b>Flex and Lieu time policy</b> that can help you accommodate these types of issues.
<b>Boundaries</b>	
Very easy to continue working past hours	<p>Establish a work routine early on and stick to it.</p> <p>Quit Outlook and Teams when your workday is complete.</p> <p>Schedule an activity at the end of your work day that will help you commit to ending your day at an appropriate time.</p> <p>Balance in work and life are important, and it is up to all of us to take responsibility for our work habits and communicate with our direct reports if work expectations are leading to working past our agreed upon work hours.</p>
Always being available and not taking breaks during the day	<p>Establish a work routine for yourself early on and stick to it. It is not healthy to work eight hours straight without a break so our policy is to encourage all staff to take a mid-day lunch and break. At Tamarack you have a paid half hour each day that is meant to be dedicated to fitness – use it!</p> <p>Challenge yourself and colleagues to add physical fitness into the day. Walking, running, and yoga are all great ways to break up your day.</p>
Not getting up from your desk/feeling burdened by the work	Take frequent breaks from sitting, physically standing up and leaving the office. Set a



	<p>timer as a reminder to take a stretch and walk around before moving to the next task.</p> <p>Take advantage of meetings where you can stand up or walk while contributing.</p>
<p><b>Internal Communication</b></p>	
<p>Hard to understand expected response times when waiting on an answer/approval</p>	<p>Don't be afraid to pick up the phone or call over Teams – learn the beauty of a two-minute voice call. At Tamarack, we want to promote a culture where we all feel comfortable to pick up the phone and call a colleague when something is needed. Too often we wait for email responses, when a quick friendly chat can get a speedy answer as well as allow you to connect with someone during your day. Think of it as seeing someone in the hallway, popping into someone's office or chatting at the coffee machine. Do remember to take into consideration the person's Teams status before calling to be sure they are available. If unsure, a quick head's up Teams message to see if it's a good time is a great starting place.</p>
<p>Not being in a physical office it is hard to know when you can reach out to people</p>	<p>Use your Teams status to update colleagues on what you are doing. If you are set to Available, people can feel free to message or call you. If you are set to Busy or Away, try to provide some context to what you're doing (for example: 'Lunch – back at 1:30'). If you do not want to be disturbed, use your Do Not Disturb setting. This will block any messages or calls coming in.</p>

**Remote Boundaries**

We want to make remote work as joyous and productive as possible and establishing policies and guidelines that work for staff and the organization, and are easy to administer, is paramount.

## Children at home and other distractions

When you work from home and if you have children, other family members or individuals at home there are issues that may arise such as:

- Illness
- Distraction by family members/pets
- Emergencies

Our flex and lieu time policies give you the flexibility to tend to children when they are sick. If you take an extra hour with your kids, our expectation is that you will make it up. The key is to **inform, not announce**. Inform your direct supervisor, and colleagues you work closely with, that you will be flexing your time and share this on your Teams for Business status. Informing is giving your direct supervisor the discretion to make the final decision; announcing is telling them after the fact or not giving them a chance to respond.

If children or other family members become seriously ill, our flex and lieu time policy can be used with approval from your direct supervisor. A scenario might be that you work four days that week or end at 3pm each afternoon and ensure that you make those hours up.

### **Tamarack's policy and expectations are:**

- You must be able to work in quiet when children or other family members are home and have the ability to maintain your privacy and a professional manner on the phone.
- You have a dedicated office space with a door that can close.
- If you have very young children, working from home is not an appropriate option for you and we ask that you find a suitable location to work outside of your home or that the kids have proper care outside of the home. We have policies in place that support you if you find that home office work is not contributing to your success. We prefer that you make the decision – either/or – to work from home or to work at an office. This is no different than if we all worked in a central office together. Our children and/or pets would be cared for elsewhere.
- If your young children are home sick or on a PA/PD day and you are their primary caregiver, you must take a care day, exercise a flex or lieu day or take a holiday.
- Please note that when you are on the phone with colleagues and external partners, it can be very distracting when children and/or barking dogs are in the background. We ask that you do your best to establish boundaries so that your work day runs smoothly.

## Home office or rented office space

Working remotely refers to working outside of a centralized office. It does not always mean working from home. Our goal is to make your work day as joyful and productive as possible,

and for some this may mean working from home, while for others it may be working from a rented space.

If working from home is not allowing you to be your best and most productive self, we encourage you to look for an office or local not for profit to work from. Tamarack will pay a reasonable rent to support you in this so that you can feel good in your workspace. Tamarack does not rent from private or commercial landlords.

Tamarack has the right to challenge situations that we deem are not conducive to remote working or if work performance is suffering because of working remotely. Should this occur, the situation will be addressed in writing and agreed-upon corrective actions recorded and monitored.

When working remotely, whether in a rented office or from within your own home, setting up a productive and pleasing office space that suits your needs and inspires creativity and productivity is essential. When setting up your office, consider the following:

- Ensure you have a dedicated space that is enclosed and has a door that you can close for complete privacy.
- Set up your office to look and feel professional and accommodate privacy - for your use only.
- Every month you receive a monthly stipend to put towards office supplies (if working from home) – be sure to take advantage of this as it will make a huge impact on your overall health and happiness. Treat yourself to a top-notch office chair, consider a laptop riser, wireless keyboard, wireless headset, foot rest and wrist rest. The more you invest in your workspace happiness, the better you'll feel each day.
- Don't feel strapped to the desk – find a place where you can stand while you work, or get up and move around your space when in a meeting.
- If working from home, keep in mind that some people are not comfortable having meetings in their home or going to meetings in homes. Please find a place near your home where you are comfortable meeting and feel free to ask to meet in such a place if you are going to a meeting in a team member's home.

### BYOD – Bring Your Own Device

Tamarack has a BYOD policy that provides compensation for monthly expenses accrued as part of your work at Tamarack. On an annual basis this will be reviewed and once approved you will receive a monthly stipend along with your monthly salary/wages for the following:

- Home office (supplies)
- Computer
- Mobile phone
- Internet

- Dedicated landline (if applicable)

Remember to keep all your receipts, as these expenses will be tax deductible.

As part of this process, employees are expected to:

- Replace equipment every 24-36 months
- Have a very reliable back up computer that is set up and ready to use if your principal device is not working
- Back up your computer at minimum once a week
- Take full responsibility for the maintenance and repair of computer

Tamarack has certain expectations with respect to staff's comfort and skill level in managing their own technology. We do not expect staff to be tech gurus but an above average comfort level in managing your own technology is a requirement of working remotely. For example, we expect all staff to know how to download software needed for the job and troubleshoot as much as possible.

If you choose to work from a rented space, Tamarack will work with you to set up an individualized BYOD plan that is suitable to your work environment.

For more details about BYOD, refer to the **Bring Your Own Device (BYOD) Policy**.

### Working Location

As a remote office, we have team members that work across Canada. If you are planning on moving from the town or city that you were hired in, this is a conversation we are open to once you have reached and passed your six-month probationary period. As certain positions need to be in commuting distance to the Tamarack Waterloo office, such positions will be identified in advance so that a staff member is aware of this condition.

If a job does not require you to be in easy commuting distance of the office and your location of work changes, a discussion with your co-CEO and approval in writing is required. Currently, positions that do not require an easy commute to the Waterloo office must be in Canada.

### Hours of Work

At Tamarack, we expect you to be in the office and complete eight hours of work excluding an unpaid meal period. The length of the unpaid meal period is 30 minutes. Each 8-hour day also includes two 15 minute breaks, a paid half hour for exercise (a walk, yoga, etc.) which we encourage all employees to take advantage of to maintain health and happiness.

Workdays typically start between 8:00 - 9:00 am and finish between 4:00 – 5:00 pm. Tamarack does offer flexible work hours in which an employee can work the same number of hours, but

the timing of the hours worked vary by mutual agreement between the employee and the direct supervisor. All requests for flex time must be approved in writing by your direct supervisor.

When you log on to work each day, it is important to write the hours you are working in your Teams for Business status so that the team is aware of your availability. Other important information regarding your hours should also be noted, for example: doctor or dentist appointments, out of office meetings, etc. It is also helpful to include what you're working on in your status to help keep the team up to date with the work that's being done each week.

## Trust

Trust is one of the most important aspects of working remotely and is something that must be treated with respect, intentionality and remain consistent each and every day you work at Tamarack. Our experience is people love working remotely and do everything in their power to build trust in order to keep this privilege. Be extra mindful of this during probationary period, as this is usually the best time to prove reliability and build trust.

### Some ways to build trust

- Work hard and meet deadlines
- Listen and learn before you speak
- Communicate openly with your colleagues and direct supervisor about work priorities and targets
- Respond swiftly and professionally to all internal and external inquiries
- Ask questions and reach out if you need help – don't let a deadline pass or leave a job incomplete because you were afraid to reach out for help
- Be available – Use Teams for Business to communicate your availability

### Should trust be bruised

Should trust be *bruised*, reconciliation action needs to be taken. If this occurs, they will reach out to share that a level of trust has broken down and we encourage you to have a healthy conversation and put a plan in place to re-build that trust. This will often include more rigour in recording the work you do and may restrict the flexibility you have around hours of work as well as work location.

If you ever feel as though trust is breaking down, reach out to your direct supervisor and/or your direct supervisor will reach out to you. If you're finding it hard to have a conversation, we encourage you to bring in a mediator to help. Our hope is that a plan can be put in place that both parties feel comfortable and happy with so that trust can be re-built and privileges re-instated.

### Should trust be broken

Should trust be broken, disciplinary action will be taken. The direct supervisor will record the issue (1. reminder and verbal warning, 2. written warning outlining past performance and the warning(s) given; 3. a probationary--and final--warning can be issued.) The direct supervisor will account for the employee's performance with a clear understanding that violating the probation will result in dismissal. It is incumbent on the employee and the direct supervisor to re-establish trust.

## Voicemail Greeting

While working remotely does not require you to work from an office each day, it is imperative that it is still treated with the same professionalism and respect. This should be reflected in your voicemail greeting on your cell phone or the primary phone you use to conduct Tamarack business. Your voicemail must have a proper employer identifier and provide enough information so that callers can decide to leave a message, to seek assistance elsewhere, or to call back.

A greeting must include the staff member's name, the learning community name, title, information regarding your availability, which includes a date, or range of dates or times you will not be available, and an invitation for the caller to leave a message.

A simple greeting looks like this:

*"You have reached Sam Smith, **Community Animator at Tamarack Institute**. I am currently not available at the moment to take your call but please leave a message after the tone and I will return your call as soon as possible."*

If you are going to be away from the office (vacation, sick day), please be sure to update your voicemail accordingly and provide the number of a colleague whom the caller may contact in your absence, if appropriate.

Responding to voicemail messages is mandatory and should be considered a priority task. All telephone calls should be returned in a timely manner.

## Travel

Tamarack has All Team meetings annually. We value this time together for developing connections and learning. It can be a challenge, however, to bring everyone together and there are always cost considerations (meals, accommodation (for some), travel (air mileage, or public transit)).

In our **Travel Policy**, we state that we will pay one way for your travel to team meetings. For Tamarack events or Custom Service, we pay the full amount and incurred expenses. For the purpose of keeping costs to a reasonable level we ask a few things:

- Share a room with a colleague if staying overnight
- Stay with friends, family or a generous colleague if at all possible
- Carpool with a colleague to come to the meeting
- We will pay for a rental car (if travel is over 100kms) or for your public transit
- If travelling by air or train or bus, please arrange to have a colleague pick you up at the terminal to avoid cab fare

For more information, see our **Travel/Mileage/Commuting Policy**.

## Tips to be a great remote worker

### Build a routine and separate work and personal life

The flexibility of remote work can seem like a dream, but without clear boundaries and routines, work/life boundaries can get blurry. Consider how you plan out your work day, for instance:

- Your work attire – sweatpants and pyjamas may be comfortable to work in, but consider separating your wardrobe based on work and play. This is by no means mandatory and will differ based on the person but consider it a way to help you feel more confident, productive and accomplished during your workday, even if no one is watching.
- Your technology - Part of the challenge of remote work is knowing when to shut it off for the day. Consider using a completely different device for work and play to help separate this for yourself. With emails and notifications occurring at all hours, using the same technology will quickly lead you into work tasks during off hours.
- Break up your day – When working alone the day can easily get away from you. Try breaking up your day into segments – for example: in Remote they talk about segmenting your day by ‘Catch up’ ‘Collaborate’ and ‘Serious Work’. Also consider breaking up your day by location. If you don’t have meetings after lunch, try working from a café for the afternoon.
- Don’t forget to take breaks – Tamarack encourages you to take a paid half-hour exercise break in the middle of your day. Use it! Working 8 hours straight is not healthy or productive.

## Communicate, communicate, communicate

Being a good communicator is an essential part of being a good remote worker. 90% of our work takes place behind a screen, so thinking about the way we communicate with one another is important for how we understand and work well with one another.

A major challenge in remote work, as reported by our staff, is miscommunication. Be mindful of this when working collaboratively or reporting on your work. Think about clarity over style and be intentional with the words you choose to represent yourself. We don't have the ability to see each other in person each day, so what someone writes in an email, or how someone speaks in a meeting, will be a major contributor to successful working relationships when executed respectfully and clearly. When in doubt, err on the side of professional over casual. For more informal chat, take advantage of Teams for Business.

## Beware of balance

In Remote, they refer to the myth that if workers are given the freedom to work remotely, they'll turn into lazy, unproductive slackers. But in reality, the book points out, "it's *overwork*, not *underwork*, that's the real enemy in a successful remote-working environment." This has been something identified by Tamarack staff as well.

Without a clear definition between home and office, it is all too easy to decide to stay in and catch up on that project you still need to finish in the evening, or get pulled into an email thread at the beginning of your day before you've even rolled out of bed. While this sounds like it could be an employer's dream, it's not the case. When work becomes an all-consuming part of someone's life they are far more likely to burn out. This is especially true when people love their work, as working those extra hours on a task they may love will eventually catch up to them – but in this case it may not emerge as a problem until it's too late.

The best workers over the long term are employees who put in sustainable hours. A 40-hour work week on average is recommended. The most important thing here is to know yourself and recognize your limits. Be on the lookout for signs of burn out in both yourself as well as your colleagues – we are a community at Tamarack and need to take care of one another. Without an office, seeing the fatigue in someone's eyes or the light on in someone's office into the evening is not evident. It is everyone's job to look out for this and to hold both ourselves and others accountable to a happy and balanced lifestyle.

## Great Working Remotely Sources

While we've made a lot of progress in improving the way we work remotely at Tamarack, there is still lots to learn and improve upon. The future of our success lies in our ability to continue to learn from one another, share new strategies and ideas and look to others who are carving their own path in this space to see how we can continue to build on our own methods. Below is



a list of the fun, informative and helpful posts, books and newsletters from the remote community that exists amongst us.

More to add? Feel free to build this list further! If you find articles or ideas please send them our way.

Happy reading!

## Posts

- [Why isn't Remote Work More Popular?](#) By Scott Berkun, Wordpress
- [10 Lessons from 4 Years Working Remotely](#) By Scott Berkun, Wordpress
- [Why Remote Work Thrives in Some Companies and Fails in Others](#) by Scott Berkun, Wordpress
- [How many companies are 100% distributed?](#) By Scott Berkun, Wordpress
- [What Remote Working Means & The Tools We Use at Buffer](#) By Courtney Seiter, Buffer
- [The Joys and Benefits of working as a Distributed Team](#) By Joel Gascoigne, Buffer
- [How we Hire at Buffer](#) By Leo Widrich, Buffer
- [What We've Learned Building a Remote Culture](#) By Nick Francis, Help Scout
- [How to Make Hiring Less of a Headache](#) By Gregory Ciotti, Help Scout
- [24 Ideas That Will Change The Way Your Remote Team Works](#) By Paul Jun, Help Scout
- [The Pros & Cons of Being a Remote Team \(& How we do it\)](#) By Alex Turnbull, Groove
- [Fog Creek's Ad Hoc Remote Work Policy, or, Working From Grandma's House](#) By Rich Armstrong, Fog Creek
- [On Working Remotely](#) By Jeff Atwood, Stack Exchange
- [Why We \(Still\) Believe in Working Remotely](#) By David Fullerton, Stack Exchange
- [Trust in People](#) By Aadi Pienaar, WooThemes
- [Being a Remote Worker Sucks - Long Live the Remote Worker](#) By Scott Hanselman, Microsoft
- [30 Tips for Successful Communication as a Remote Worker](#) By Scott Hanselman, Microsoft
- [How to Combat Loneliness in the Age of Working Remotely](#) By Christie Nash, Tamarack Institute
- [How to Build and Manage a Team of Remote Writers](#) By Aaron Agius, HubSpot
- [50 Great Remote Working Resources](#) By Founders Grid
- [How Remote Work May Impact our Brains and What To Do About It](#) by Leo Widrich

## Books

- [Remote](#) By Jason Fried & David Heinemeier Hansson, Basecamp (formerly 37 Signals)
- [Rework](#) By Jason Fried & David Heinemeier Hansson, Basecamp (formerly 37 Signals)
- [A year without Pants](#) By Scott Berkun, Wordpress

## Newsletters

- [Remotive](#) - Remotive is a bimonthly curated publication full of interesting, relevant links.