Leadership/Department Checklists for Remote Work Employees

Prior to using this checklist, please review the REMOTE WORKING PARAMETERS AND BEST PRACTICES to ensure you and your department are as effective as possible during the telecommuting process (modified from Workplaceless Emergency Remote Work article and checklist)

The following lists contain activities to consider and plan for when considering moving departmental activities all online. Not all of the information listed is applicable to every position at UW-Stevens Point and there may be additional needs based on the position or department. Certain tasks may be delegated by the leader. Use the excel template if unable to print.

Note: Departments which provide support for particular items are listed in parenthesis.

**Coordinate with your HR Representative before reducing an employee's hours!**

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<th>Employee Name(s):</th>
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<th>Key Departmental Functions (MUST get done because of compliance, student need, resources, etc.)</th>
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<th>Peripheral Departmental Functions (can get done but are less critical to the continued function of the office/department/unit)</th>
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<th>Stopped Departmental Functions (are not a priority at this time. You should still track this information to assure that you can pick the projects up later when normal working conditions return.</th>
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### Before Moving to Remote Work

**Considerations**

- **Set expectations** about what the core hours, what platforms to use for communicating, meetings, any reporting of work, etc.

- Consider current resources for your virtual workspace needs (IT). What tools and/or systems will you use?

- Discuss hardware and software needs for position with Service Desk or, if in a College, contact your College Support Team member (CST)

- Tentatively plan your schedule of major deadline, check-ins, and up-tick in service provision as you are able. Prioritize projects and assign metrics that are appropriate per your set schedule.

- Clarify who is essential to the operations of the unit using your Continuance of Operations Plan (COOP) and who is not essential to those operations. Identify your minimal staffing levels and use those determinations in setting expectations and creating goals.

- Where possible, allow for testing and learning of the tools used off-site while on-site to assure employees understand how they work and have an opportunity to ask questions. This is a good development opportunity ofr colleague-to-colleague training.

### Working Remotely

**Remote Working Space**

- Discuss staff meetings (when, where, etc.) and an overview of any standing meetings the staff will be involved in

- Use Enterprise software (Zoom, Microsoft Teams, Skype for Business) for work related functions. Refrain from using personal emails/folders/drives etc. wherever possible.

**Technology Access**

- Identify where secure information will go if those working from home need access. Reminder: Do not share sensitive information over email or with coworkers. For best practices, reference the IT Security webpage.

- Coordinate final technology needs with Service Desk or CST and confirm set-up timeline

- Email the Telephone Support Office with changes to the General Office Listing (name, phone number, etc.) per their recommended request timeframe.

**Training and Development (Coordinate or plan as necessary)**

- Mandatory Trainings are considered paid work time. Employees who may otherwise not be able to work from home can complete Mandatory training and get paid.

- Professional and career development assigned by a supervisor can also be considered as work time. Assure that specific goals and outcomes are defined and revisited after remote working is over. Use LinkedIn Learning (previously Lynda) for free learning.

- If you have concerns about an employee, or concerns emerge when an employee is remote working, document and discuss with HR. Consult our Performance Management webpage for tools and guidance.

**Communication**

- Notify department and campus (optional; MOD) of your expectations for service delivery for remote work

- Schedule meetings strategically. Access to your colleagues and to campus will look different. Consider how you can set up and use that time in the most efficient way possible.

- Document and communicate decisions in an accessible location.

- Provide the departments current short and long-term goals

- If your employees are supervisors, assure they have time scheduled with their direct reports

- Be patient. Working remotely is new for many of our employees. Assume good intent.

- Supplemental for Faculty:
  - Coordinate department meetings
  - Coordinate Teaching Partner

**Call employee**

- How are things going? What concerns do you have? What do you this is working well?

- Encourage questions and make time to listen

- Discuss computer and mobile device options (laptop, phone, and tablet)
### Physical Work Space and Equipment
- Clean the work area if someone will be present on-site
- Create (or purchase) a card or poster for when/if no-one is onsite with directions to customers about how they can connect with staff
- Coordinate cleaning and maintenance items as needed (ex: wax floors, paint, light bulbs, etc.) (Facilities Services)
- Gather and arrange work supplies
- Assure any employees working on campus have a key/card access to the building (Facilities Services)
- Create action plan/tasks for the employee who will be on-site, if anyone

### Performance Management

#### Initial duties
- Create a list of small projects or activities for the individual to complete during the period of remote work. Measure/track work as you are able AND/OR have signals for when someone might be struggling

#### Accessing critical materials
- Remote working initial schedule
- Position description and expectations (for faculty: include tenure expectations and procedures)
- Department handbook
- Department COOP
- Other:

#### Review office processes & procedures
- Incoming/Outgoing mail
- Work supplies ordering expectations and procedures
- Department letterhead and University logo/branding information (if applicable)
- Provide the department's process for reserving meetings rooms or show the individual how to reserve rooms
- Describe records retentions for department

- Read subsequent checklists to completely prepare
- Additional activities:

#### Socialization
- Discuss familiarity with campus and community resources for managing through this difficult time.

### After we return to normal operations: Monitoring and Supporting Success

*Meet with your employee bi-weekly or monthly (more frequently informally or formally if needed)*

#### Informal/formal performance appraisal (informal or formal depending on type of position)
- Check in with employee to let them know how they are doing
- Discuss campus employee policies and address questions
- Conduct performance reviews on the normal schedule
- Discuss short & long term performance goals

- Solicit feedback on what went well and what is an opportunity for update/change
- Schedule annual performance review and discuss expectations for documenting/tracking/assessing outcomes
- Update the Continuance of Operations Plan (COOP) or create your first once including the learning from employees.

- Additional: