Northwestern | OFFICE OF HUMAN RESOURCES

Manager Checklist for Team-wide Workplace Strategies

1. **Understand School/Unit Workplace Strategies policies and guidelines and who to go to with questions or for support within your area.**
2. **Understand relevant University policies (link to page with relevant policies) and who to go to with questions or for support within Central HR.**
3. **Establish team norms:**
    - Team norms are the guiding principles by which you and your team operate and interact with each other. These norms are meant to foster and strengthen the team's culture and effectiveness by establishing shared values and building on those values. For example, your team may decide that you value collaboration. The team may then create a norm that team members regularly ask how each other is doing and if they need help with a current task or project.
    - A User Manual can help team members to share preferences for how they like to collaborate and communicate. It is a great tool for managers to use to get to know the people they manage and work with on a more inclusive and authentic level.
    - Managers are essential in fostering an environment where key values and behaviors thrive. To determine your team's values and norms, consider starting with this Values exercise.
    - You may also want to take the additional step of developing a team charter. Team charters are a way to document who's on your team, what you're trying to accomplish and how you will go about your work and interactions. While a charter takes time to create, many teams that use them find that it can save time, accelerate work, and support important conversations, even reduce burnout.
4. **Draft a work plan with your team, keeping values and norms in mind:**
    - Review work schedules and responsibilities:
        - Every role should be considered for one or more Workplace Strategies based on operational needs and legal requirements. If the preferred unit-wide strategy won't work for a particular role, then other strategies should be considered instead.
        - What are each member's routine responsibilities/tasks? Where, when and how must those tasks be accomplished?
        - What are the team's core hours of availability? What are the expectations for both online and on-site availability?
        - What would help each team member succeed?
    - What kinds of technology and resources will team members need to fulfill their responsibilities while utilizing one or more Workplace Strategies?
        - What platform (s) will you use to communicate as a team (MS Teams? Zoom? Email?)
        - Do team members know how to access technical support if needed?

    - If tasks can be fulfilled via one or more Workplace Strategies, how will that impact operations, colleagues or stakeholders?
    - What routine responsibilities/tasks require regular communication and collaboration with others?
    - How will you ensure that non-exempt employees who are working remotely do not work over their approved hours without your prior approval?
    - How will you communicate your plans with partners and stakeholders?
    - Are there upcoming events or meetings that may need to be postponed or canceled?
5. **Make a communication and accountability plan:**
    - If you haven't determined team norms for communication then start by setting mutually agreed expectations around work updates and progress (e.g., method, frequency)
    - Be sure to discuss how as a team you will handle emails, instant messages, timelines, deadlines, calendaring systems, sharing files and the like. Consider how to handle updates and communication when a team member is absent as a group. For example, you might decide to house all project files in Teams but only use Teams IM if there's a truly time-sensitive question that needs an answer and otherwise communicate via Outlook.
    - Managers can and should determine what the non-negotiables are including schedule parameters and core hours, based on business needs. You might decide, for example, that all team members, including the remote employee, need to attend a monthly team meeting in person and that everyone needs to be accessible between 10 am and 3 pm.
    - Conduct regular check-ins with the team as a group, in addition to regularly scheduled team meetings and regular 1:1 check ins.
        - Consider starting each workday with a phone, video or instant message chat.
        - Try as much as possible to maintain team meetings and check-ins
        - Understand and build in safeguards against proximity bias, "the tendency for those in authority to show favoritism or give preferential treatment to employees who are closest to them physically".
6. **Lead with trust, empathy and a focus on clear communication, shared expectations and concrete results:**
    - Stress measurable results and reaching objectives—regardless of work arrangement.
    - Evaluate success based on the following:
        - Each employee's completed work is on time and meets or exceeds expectations re. quality and quantity.
        - Each employee is meeting or exceeding the expectations set in the Workplace Strategy documentation.
        - Each employee is adhering to all relevant School/Unit and central policies, rules and practices.
        - The impact of each employee's Workplace Strategy(ies) on stakeholders, clients, colleagues and others is neutral or positive.
7. **Regularly evaluate and adjust the Workplace Strategy plan with the team:**
    - Pilot the new plan for 30-90 days to assess feasibility.
    - Discuss the impact of the team Workplace Strategy plan on team goals, stakeholders, team culture etc. at least quarterly as a group.