

Manager Checklist for Individual 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. **Evaluate the proposal:**
 - Review the proposal within the context of the role's work schedules and responsibilities:
 - Every role should be considered for a Workplace Strategy based on operational needs and legal requirements. If the proposed Workplace Strategy won't work for this particular role, then other strategies should be considered instead. For example, a position the proposal is for a hybrid or remote Workplace Strategy but the position requires in person interaction with students or hands on work in a lab
 - What are this individual's routine responsibilities/tasks? Where, when and how must those tasks be accomplished? Will the workload need to be restructured?
 - What are the expectations for both online and on-site availability?
 - What would the impact of the proposed Workplace Strategies be on operations, colleagues or stakeholders?
 - Do other staff members on the team have access to similar consideration for a Workplace Strategy(ies)?
 - What kinds of technology needs and resources will this individual need to fulfill their responsibilities while utilizing one or more Workplace Strategies?
 - What platform (s) (MS Teams? Zoom? Email?) will this individual use to communicate with the team? With stakeholders?
 - Does this individual know how to access technical support if needed?
 - What routine responsibilities/tasks require regular communication and collaboration with others?
 - If the individual is non-exempt and working remotely or hybrid, how will you ensure they do not work over their approved hours without your prior approval?
 - How will you communicate this individual's Workplace Strategy(ies) with partners and stakeholders?
 - Are there upcoming events or meetings that may need to be postponed or canceled?
4. **Make a communication and accountability plan:**
 - Set mutually agreed expectations around work updates and progress (e.g., method, frequency)
 - Be sure to discuss how both the individual and the larger team will handle emails, instant messages, timelines, deadlines, calendaring systems, sharing files and the like. Consider how to handle updates and communication with the team when this individual is absent. 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 employee proposing the Workplace Strategies, 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 as, “the tendency for those in authority to show favoritism or give preferential treatment to employees who are closest to them physically”. Proactively work with your team to determine how every member's ideas and feedback will be solicited and considered, whether they're on or off site. Make sure you assess team members' contributions and success based on clear expectations and outcomes and that you evaluate team members for recognition, opportunities (such as leading meetings or high visibility projects) and promotion using the same standards and framework.

5. 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:
 - The employee's completed work is on time and meets or exceeds expectations re. quality and quantity.
 - The employee is meeting or exceeding the expectations set in the Workplace Strategies documentation.
 - The employee is adhering to all relevant school/unit and central policies, rules and practices.
 - The impact of the employee's Workplace Strategies on stakeholders, clients, colleagues and others is neutral or positive.

6. Regularly evaluate and adjust the Workplace Strategies plan with the individual and with the team:

- Discuss the impact of the Workplace Strategies on team goals, stakeholders, team culture etc. at least quarterly.
- **Newly implemented Workplace Strategies should begin with a 30–90-day trial period to assess feasibility.** This trial period should include regular check ins specifically regarding how the Workplace Strategy plan is working.
- Workplace Strategies need to be flexible to be effective. Everyone's priorities and needs will change over time and so the arrangement may need to change, too.