

## Individual Contributor Checklist for Proposing and Implementing 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](#) and who to go to with questions or for support within Central HR.**
3. **Create your proposal:**
  - Consider your role and responsibilities; what Workplace Strategy/ies would support you in successfully accomplishing those responsibilities?
  - What routine responsibilities/tasks require regular communication and collaboration with others? How would you accomplish these interactions while using Workplace Strategies?
  - What would the impact of the proposed Workplace Strategy/ies be on operations, colleagues or stakeholders?
  - What kinds of technology needs and resources do you need to fulfill your responsibilities while utilizing the proposed Workplace Strategy/ies ?
  - If you engaged in any Workplace Strategies in the past (including during the lockdown period), what were the benefits? What were the challenges? What have you learned from that experience and how would you apply that learning to your proposed Workplace Strategy/ies ?
  - How will you stay in touch and be available to your manager? Your team? Your stakeholders?
  - Anticipate and address any other concerns that your manager, colleagues, senior leaders or stakeholders might have.
4. **Schedule a time with your manager to discuss your proposal and make any edits before formal submission.**
  - Present your proposal
  - Focus on the benefits of the proposed Workplace Strategy/ies for your and the team's goals.
  - Ask your manager for any questions or concerns they may have.
  - Your manager can and should determine what the non-negotiables are, including schedule parameters and core hours, based on business needs. They might decide, for example, that all team members, including you, need to attend a monthly team meeting in-person and that everyone needs to be accessible between 10 am and 3 pm. Consider, then, how you will incorporate those non-negotiables into your proposal.
  - Understand that your manager has the right to ask for edits or to deny the proposal based on operational and stakeholder needs.
  - Strive to collaborate with your manager in exploring options and creating a plan that works for all involved.
5. **Formally submit a [written proposal](#) to your manager.**

**6. Once approved, make a communication and accountability plan with your manager and team:**

- Establish mutually agreed expectations around work updates and progress (e.g., method, frequency).
- Make sure you have a written agreement on what constitutes success in your role and how specifically you will measure that success.
- Do you understand how you and the team will handle emails, instant messages, timelines, deadlines, calendaring systems, sharing files and the like? How will updates and communication be managed during periods when you're 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.
- Be proactive in checking in with your manager and colleagues whether you're on or off-site.

**5. Focus on clear communication, shared expectations and concrete results:**

- Your Workplace Strategy/ies proposal will be successful based on the following:
  - Your completed work is on time and meets or exceeds expectations re. quality and quantity.
  - You are meeting or exceeding the expectations set in the Workplace Strategies documentation.
  - You are adhering to all relevant school/unit and central policies, rules and practices.
  - The impact of your Workplace Strategy/ies on stakeholders, clients, colleagues and others is neutral or positive.
- Focus on measurable outcomes and track your data.
- Be proactive in checking in with your manager and colleagues and making sure you all are on the same page regarding timelines and expectations. Raise questions, concerns and issues as soon as possible.

**6. Regularly evaluate and adjust the Workplace Strategies plan with your manager and with the team:**

Discuss the impact of the Workplace Strategy/ies on team goals, stakeholders, team culture etc. at least quarterly. 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