Telework Considerations Sample Checklist
(Tasks appear in no particular order; list is non-exhaustive; updated March 20, 2020)

**Office Logistics**
- Determine start/end dates of telework and how any extensions will be communicated.
- Determine if team members are permitted to return to the office and under what circumstances.
- Turn off office lights/equipment, empty the refrigerator and alert appropriate stakeholders (e.g., landlord, cleaning staff).
- Identify how mail/packages will be brought in and processed, as well as any special considerations for checks, membership paperwork and other urgent documentation.

**Home Office/Daily Expectations**
- Discuss expectations re: home office setup (e.g., dedicated space or make-shift office).
- Discuss expectations re: distractions (e.g., kids, pets and other adults).
- Determine expectations re: daily work hours and attire (particularly for video calls).
- Discuss expectations re: availability for unscheduled phone/video calls and returning emails/Slack messages.
- Discuss guidelines re: errands (e.g., shopping) and at-home tasks (e.g., laundry, dishes).
- Review handbook to determine any modifications to policies/procedures.

**Payment Processing**
- Verify there will be no delays in processing payroll.
- Determine how incoming payments will be deposited/processed.
- Determine how outbound payments will be made/processed.
- Identify how checks that require physical signatures will be administered.
- Ensure necessary financial controls are in place.

**Phones & Internet**
- How will incoming calls to the main phone line be processed/redirected?
- Do voicemails on individual staff phones need to be updated/rerouted?
- What are the expectations re: personal phone service at home? Cell phones?
- Do all team members have access to sufficient WiFi at home?
- Will stipends be issued for personal use of internet/phones?

**Equipment & Software**
- Consider the equipment needs of team members, including but not limited to computers, monitors, cables and printers.
- Consider the software/access needs of team members, including but not limited to Office suite, email, AMS, CRM, passwords and the like.
• Identify a collaboration platform for team members (e.g., Slack) and discuss expectations re: use (e.g., Status updates, video calls)
• Ensure staff have necessary training on how to use technology, including platforms they may not use regularly (e.g., video conference software)
• Determine how staff will receive tech support while remote

Supplies
• What can people take home from the organization’s office – electronics (e.g., monitor, computer and supplies (e.g., paper, post-its, pens)?
• What can people order and be reimbursed for (e.g., printer ink)?

Meetings & Calendar
• Determine how staff, board and committee meetings will be facilitated, including audio and video protocols
• Review the current team calendar – note meetings/events that require attention, modification and rescheduling
• Team meetings – Will you have daily status meetings? Weekly one-on-one meetings?

Key Contacts
• Ensure a list of key contacts (e.g., board, committees, staff) and their cell phone numbers is aggregated and disseminated to all appropriate individuals
• What is the succession plan should the chief staff executive become ill?
• Who should be alerted if any team member becomes ill?
• Who is authorized to represent the organization’s key messages to members/media?

Communication
• Determine who should be alerted about the telework plan (e.g., board, committee leaders)
• Determine if announcements should be posted via social media and website

Team Morale
• How will you support team members through uncertain times of change?
• How will you help team members process their feelings of fear, anxiety, etc.?
• What remote teambuilding activities will you institute to help team members stay connected?

Wellbeing & Time Off
• How will you support the team’s mental health (e.g., modified PTO policies)?
• How will you encourage nutrition and movement/exercise?
• How will you accommodate time off on short notice due to personal/family matters?
• How will you accommodate the unique needs of individual team members?