

## 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?