

## CHECKLIST SUMMARY

### PERFORMANCE & PRODUCTIVITY

- Set clear expectations (short/long-term goals)
- Hold regular check-ins (trust, monitor, and measure)
- Utilize tools (incorporate technology to track and communicate)
- Intervene early and often (provide feedback asap, seek out why there is an issue)
- Conduct regular ACHIEVE check-ins (discuss goal progress and development)
- Address performance concerns (consult HR Business Partner if needed)
- Manage non-exempt employees (ensure schedules with break/meal periods are followed)

### ENGAGEMENT & EMPLOYEE SUPPORT

- Refer to the [Engagement Toolkit](#) for managing engagement remotely
- Stay in touch (communication is key)
- Have some fun (fun activities for your team to bond or blow off steam)
- Show you care (check-in on a personal level with employees)
- Set an engagement goal or revisit an existing one
- Encourage self-care and work/life balance; promote healthy activity
- Refer to resources available on the [Virtual Self-Care Wellness Resources](#)
- Share specific webinars or videos employees might find useful
- Refer to [mental health resources](#), set boundaries and check-in (consult their HR representative for serious concerns)
- Be positive and build trust
- Report COVID-19 cases [here](#) and with HR representative

### TECHNOLOGY

- Use new electronic tools to stay in touch, manage projects, and keep visibility to all work being accomplished
- Work with employees to allow employees to bring home needed equipment (with [agreement](#))
- Consider online training for computer applications (and other skills) through [Udemy](#)

### WORKSPACES & ERGONOMICS

- Ensure every employee has completed and current [telecommuting agreement](#)
- Review the [EH&S Guide to Ergonomics – Working Remotely](#) with their employees
- Require employees to take (or retake) the “Ergonomics: Computer & Office” course online at [UC Learning Center](#)
- Work with employees to allow employees to bring home needed equipment (with [agreement](#))

## PLANNING FOR THE FUTURE

- Review the phases of operations below and begin planning for the future phases and read the Leader Guide for Working Well™
- Identify next steps for your team and discuss ideas with them
- Update Business Continuity Plan as needed

## LEADING A REMOTE WORKFORCE

Overnight, many leaders went from managing an on-site operation to managing remotely. The following checklist assists leaders in managing their remote workforce. The checklist is divided into five sections:



### PERFORMANCE & PRODUCTIVITY



### ENGAGEMENT & EMPLOYEE SUPPORT



### TECHNOLOGY



### WORKSPACE & ERGONOMICS



### PLANNING FOR THE FUTURE

During these changing and uncertain times, it is now even more important that UCI supervisors are frequently checking in with staff, finding the right balance between trust and monitoring productivity, and supporting employees in a variety of needs. Any supervisor that encounters a challenge is encouraged consult their Human Resources Business Partner.



## PERFORMANCE & PRODUCTIVITY

### SET EXPECTATIONS:

Share clear expectations and collaborate on setting short and long-term goals. Update prior expectations with employees if remote work has temporarily changed the nature of their role. Employees without other restrictions (e.g., COVID-19 related childcare) should be held to similar productivity level expectations as when they were previously performing in the office.

- **Short-Term Goals:** These are agreements (goals) between you and your employee on what will be accomplished between now and your next meeting (or other date). Keeping track of these goals in a shared document allows for live updating and keeping you and your employee on the same page.
- **Long-Term Goals:** Enter in the ACHIEVEonline system. See the [ACHIEVE Staff Performance Program web page](#) for system access and a video on setting goals (as well as sample goals.)

**REGULAR CHECK-INS – TRUST, MONITOR, AND MEASURE:**

Trust your employee to get the work done that was agreed upon during goal setting (whether short-or long-term). Check-in regularly with employee for updates with employees on longer term goals. Review results and provided feedback, both improvement-oriented and recognition-oriented.

**UTILIZE TOOLS:**

See the Technology section below for utilizing various electronic resources to track and monitor productivity and performance.

**EARLY INTERVENTION:**

Through monitoring and checking in with employees, supervisors should quickly identify any performance or productivity concerns with their employees and have a conversation.

- For example, “I expected that the report would be ready for the team’s review yesterday, but you just shared that it won’t be ready until next week. I am concerned about the delay because this report is a crucial step to our project, which has a deadline in June. Let’s talk about the delay. Why do you think it’s not ready?”
- If the employee identifies issues with their workspace, competing priorities/other work took precedent, or another issue beyond their control, supervisors should partner with their employee on identifying a solution or workaround.
- If the employee is unable to provide a legitimate reason for the delay, the supervisor should revisit expectations with the employee and identify how the supervisor wants to be notified of potential delays. If the employee has or continues to struggle in an area, then the supervisor should progress with performance management (see below).
- If the employee cites any concern related to a health condition of themselves or family member, the supervisor should consult their HR representative.

**ACHIEVE CHECK-INS:**

In addition to frequent check-ins, employees and supervisors also benefit from targeted discussions that focus on improving current performance and grooming talent for the future. Ensure you and your employee complete the online ACHIEVE Check-In, per the following schedule:

| CHECK-IN NAME | TIMEFRAME COVERED | RELEASE DATE | EMPLOYEE/MANAGER DUE DATE | CLOSE DATE |
|---------------|-------------------|--------------|---------------------------|------------|
| APRIL         | DEC 1 - MAR 31    | FEB 1        | APR 30                    | APR 30     |
| AUGUST        | APR 1 - JUL 31    | JUN 1        | AUG 31                    | AUG 31     |
| DECEMBER      | AUG 1 - NOV 30    | OCT 1        | DEC 31                    | DEC 31     |

More information may be found online: <https://hr.uci.edu/partnership/performance/>

**ADDRESSING PERFORMANCE CONCERNS:**

Regardless of whether employees are working on-site or remotely, they shall be held to fair performance expectations and accountable for their performance and conduct. For performance concerns that are not particularly severe or egregious and where there is not a history with the employee, the supervisor should

meet with the employee to review expectations and provide feedback on areas for improvement. Supervisors may issue a counseling memo, a form of coaching, to summarize the conversation. To progress past coaching, supervisors should consult their HR Business Partner.

#### □ **MANAGING NON-EXEMPT EMPLOYEES:**

Supervisors should ensure that non-exempt employees are adhering to their normal work schedule as outlined in their Telecommute Agreement.

- Non-exempt employees should not work more than their normally scheduled hours, unless they have prior supervisory approval.
- Check in on non-exempt employees to ensure they are taking their breaks and meal periods per their Telecommute Agreement.



## ENGAGEMENT & EMPLOYEE SUPPORT

#### □ **ENGAGEMENT RESOURCES:**

Supervisors should refer to the [Engagement Toolkit](#) for managing engagement remotely.

- **Staying in Touch:** Whether daily Zoom stand-ups, check-ins using Microsoft Teams, or other team communication, supervisors should maintain frequent communication with their employees, both in a team setting and one-on-one. Identify other ideas in the toolkit.
- **Have Some Fun:** An engaged team is a productive team. Supervisors should find ways for team members bond over new and different activities. Schedule virtual informal chats and coffees with colleagues – not just official meetings. Check the toolkit for ideas. Zoom scavenger hunt or COVID bingo, anyone?
- **Show You Care:** Supervisors should check-in with employees on how they are doing; not just what they are doing. For example, a simple question, “Aside from work, how are things going?” shows that a supervisor cares about their employee as a person and their general well-being.

#### □ **ENGAGEMENT GOALS:**

Teams should continue work on their engagement goals. Modifications to goals may be needed given the remote environment. Teams that do not have engagement goals should use this time as an opportunity to discuss team engagement and set an engagement goal. Supervisors should lead teams to setting relevant and attainable goals. Supervisors may wish review the [2019 Engagement Survey Information](#).

#### □ **SELF-CARE RESOURCES:**

Supervisors should share the resources available on the [Virtual Self-Care Wellness Resources](#) page.

For example, there is a [“Mindfulness in the Times of Stress”](#) video presented by the UCI Susan Samueli Integrative Health Institute that teams may want to watch together during a team meeting. Some employees may find Headspace’s free [“Weathering the Storm”](#) meditations and exercises useful.

- **Promote Healthy Activity:** Recommend staff to build in time to move, stretch or do some chair yoga. Changing postures is even more important when your workstation is not as ergonomic as you would like. Supervisors should encourage staff to walk and pace during calls.

#### **MENTAL HEALTH RESOURCES:**

Supervisors may also refer employees to the various **mental health resources** available. For serious concerns, supervisors should consult their Human Resources representative.

- **Boundaries.** Supervisors should establish clear time boundaries for work so that employees are not connected and thinking about work around the clock.
- **Check in.** Supervisors should check-in with their employees on a personal level.

#### **BE POSITIVE:**

It is important to have a positive attitude and build trust with employees so they are productive and successful.

- REPORT COVID-19 CASES:** Supervisors should report all suspected and confirmed COVID-19 cases as described [here](#) as well as with their HR representative.



## TECHNOLOGY

#### **ELECTRONIC TOOLS:**

There are a variety of tools that teams can use to stay in touch, manage projects, and maintain visibility of all work being accomplished. Some of the most popular applications are listed below. Supervisors may want to assign an employee to review options and present to the supervisor or team for consideration.

- **Google Docs** – good for file sharing, group editing, and obtaining feedback.
- **Slack** – for quick communication on a team or project basis.
- **MS Teams** – chat, call, share documents, or use plug-ins for various other apps for UCI, team, and project communication.
- **Zoom** – good for meetings with deep/important discussion or large number of attendees; able to make recorded webinars and present desktops.
- **Trello** – manage to-do lists or team projects in bulletin board format.
- **DocuSign** – route documents online for signature.

#### **COMPUTERS:**

With department and supervisor approval, employees may bring home computers, monitors, keyboards, mice, etc. to enhance their home office on a temporary basis. Supervisors will need to coordinate access to the building and ensure completion of **Equipment Loan Agreements**.

#### **TRAINING:**

UCI now has UdeMy courses online for free. Supervisors can work with employees to identify needs and set goals to take online training, practice new technology, and share progress with supervisor.



## WORKSPACE & ERGONOMICS

### TELECOMMUTING AGREEMENTS:

Ensure every employee has completed and current **telecommuting agreement** on file with the department.

### GUIDE TO ERGONOMICS:

Supervisors should review the **EH&S Guide to Ergonomics – Working Remotely** with their employees and encourage employees to review their workspaces, making adjustments as they are able. Supervisors should consult their HR representative if an employee expresses concerns regarding pain or health conditions related to their workspace.

### ERGONOMICS TRAINING:

Supervisors should require their employees to take (or retake) the “Ergonomics: Computer & Office” course online at **UC Learning Center**.

### BORROWED EQUIPMENT:

With department and supervisor approval, employees may take home their office chair, footstools, monitor stands, etc. to enhance their home office on a temporary basis. Supervisors will need to coordinate access to the building and ensure completion of **Equipment Loan Agreements**.



## PLANNING FOR THE FUTURE

### IDENTIFY NEXT STEPS:

Review the phases of operations below and begin planning for the future phases using the Leader Guide in Working Well™. The reopening of University operations will occur gradually, over an extended period-of-time, and in a carefully measured fashion consisting of four phases:

- **Phase 1** – Critical (Essential) Operations

Critical activities mean essential operations and the essential personnel to carry them out.

- **Phase 2** – Operations That May Pose Lower Risk for Virus Transmission

This phase includes operations which are critical for UCI to be able to meet expectations on quality and availability of services to its primary stakeholders in the immediate and near future.

- **Phase 3** – Operations That May Pose Higher Risk for Virus Transmission

This phase includes operations that are important for UCI to maintain services in the immediate or near future.

- **Phase 4** – Operations After End of Stay-at-Home Order

This phase includes all other operations.

### UPDATE BUSINESS CONTINUITY PLAN: Supervisors should review and update **business continuity plans**.

Plans should be entered into **UC Ready**.

## ADDITIONAL RESOURCES

- **[“How to Manage Remote Employees” Article and Webinar by Gallup](#)**
- **[“Curb Zoom Exhaustion by Shortening Meetings”](#)**
- **[“Remote Work in the Age of Global Change” Webinar](#)**