

UW–Madison

Remote Work Suitability Assessment Guide

for Managers

Purpose:

This guide is intended as an optional resource to help school, college, and division leadership (or their designee) determine what positions are well-suited for regular or occasional remote work, and to help managers and human resources determine which employees are well-suited for regular or occasional remote work. Ultimately, remote work decisions will be made by the Dean, Director, or Vice Chancellor of the school, college, or division.

An employee or supervisor may recognize the benefits of a remote work agreement, and either can suggest remote work as a possible work arrangement. This guide is designed to assist in the assessment and discussion of the possibility of remote work.

The assessment tools are designed to help facilitate a conversation between an employee and their manager to assess together if regular or occasional remote work (i.e., on certain days of the week or under specific circumstances) arrangements may be appropriate. Areas where the employee's and manager's assessment do not align are opportunities for further discussion.

Managers will also be considering other factors, like business need, customer service, and performance management. The employee's manager and HR Representative have authority to advance the remote work request to the Dean, Director, or Vice Chancellor for final approval.

The definition of remote work at UW-Madison is "a work arrangement in which some or all work is performed at an off-campus work site such as home or in an office space near home." This definition does not include workplace flexibilities, research trips, sabbaticals, or permanent off-campus work sites established by the university (e.g., field stations, CERN, IceCube)." ([UW-Madison Remote Work Policy](#))

Using this tool, managers can make and implement remote work decisions using these steps:

Step 1: Determine if school, college, or division is permitting remote work and if positions eligible for remote work have been identified centrally.

Step 2: Dean, Director, Vice Chancellor, or designee determines the remote work suitability of a position based on responsibilities.

Step 3: For a position determined suitable for remote work, determine the suitability of an employee to perform work remotely based on the ability of the employee to do their job on-site in the past.

Step 4: Discuss the remote work request and suitability assessments with the employee.

Step 5: Advance recommendation to the Dean, Director, or Vice Chancellor (or their designee).

Step 6: Decision to approve or deny by the Dean, Director, or Vice Chancellor (or their designee).

- A. If approved, complete and submit the remote work agreement.
- B. If denied, provide employee explanation, and plan to revisit as needed in the future.

Step 7: Implement and plan continuous communication and review of remote work agreement.

Resources to support remote work and reuniting campus are available at the end of this guide.

Step 1: Determine if school, college, or division is permitting remote work and if positions eligible for remote work have been identified centrally.

If your leadership (Dean, Director, or Vice Chancellor) is permitting remote work, determine if eligible positions have been identified centrally at the school/college/division level or if this decision has been delegated to units and/or individual managers.

Then, use this guide to support your decision making, conversations and implementation. If you are unsure, check with your manager or human resources representative.

If your division is permitting remote work, communicate the following to your employees:

- The remote work policy goes into effect August 1, 2021. The [policy includes criteria and conditions for remote work](#).
- Any restrictions or expectations your division's leadership has determined.
- The process your school, college or division is using to request a remote work arrangement.

Note that either the employee or the manager can suggest remote work as a possible work arrangement, and this guide can be used when either initiates the request.

Step 2: Dean, Director, Vice Chancellor, or designee determines the remote work suitability of a position based on responsibilities.

A position is suitable for remote work when it has some (or all) responsibilities that can be performed away from the regular work location without impacting productivity, operational efficiency, customer service, and team collaboration. If this determination has been made at the school/college/division or unit level, then skip this step and move to Step 3 (below).

Equity is foundational in the assessment of work. To ensure equity, consider the responsibilities of the position, *not* the person. If you have multiple employees in the same or similar roles, complete the position suitability assessment ONCE and use it for each employee's request to ensure consistency.

Share this blank assessment with your employee and request they complete it before scheduling a discussion with them.

This list provides examples of tasks and responsibilities that may potentially be performed remotely; the list is not intended to be exhaustive. If needed, add additional tasks and responsibilities your employee is responsible for that may be performed remotely:

Auditing	Analyzing Data
Budgeting	Calculating
Computer Programming	Software Development
Research	Recruiting/Sourcing
Project Management	Preparing curricula and learning aids
Graphics Work	Individual work that is non-collaborative
Editing or Writing	Data entry

When assessing position suitability, employees and managers should select one rating for each question, using the following ratings:

5=Always 4=Usually 3=Sometimes 2=Seldom 1=Never

	Employee	Manager
Tasks or functions in this job can be independently performed		
Work products or outcomes are (or could be) defined and measurable based on objectives set with the manager		
Tasks or functions of this job can be performed remotely with an overall neutral or overall positive effect on the team, customers and organization		
Primary tasks require large blocks of time that involve analysis, planning, data entry, reading, writing, programming (see additional examples in table above)		
The employee in this role has control over arranging the face-to-face interaction the job requires		
The job responsibilities can be performed remotely and there is no difference in the level of service provided to customers		
Totals:		

*Note that a higher score on this section indicates the position may be suitable for remote work.

	Employee	Manager
The role requires face-to-face interaction		
The role relies on shared in-office reference materials to do the job (i.e., archived project files, policy manuals, etc.)		
The role requires access to sensitive data or confidential conversations		
The role requires a high level of data security		
Totals:		

*Note that a higher score on this section indicates the position may *not* be suitable for remote work.

Reminder: Areas where the assessment scores by the employee and manager do not align are an opportunity for discussion about the understanding and suitability of the role for remote work.

Step 3: For a position determined suitable for remote work, determine the suitability of an employee to perform work remotely based on the ability of the employee to do their job on-site in the past.

Once it has been determined that all or some of the role responsibilities can be performed outside of the regular work environment either centrally at the school/college level, at the unit level, or by a manager, the suitability of the employee for remote work must be assessed.

As a manager, you are responsible for ensuring equity is foundational in your assessment of an employee’s suitability for remote work. Take the employee’s preferences into account by listening, asking questions, and being curious.

Managers and employees should complete the following assessment and discuss it when requesting approval to work remotely. Share this blank assessment with your employee and request they complete it before scheduling a discussion with them.

The [self-determination checklist](#) is an additional resource to help employees (including managers) assess their own readiness to reunite on campus this fall.

Please note that this is *not* to be used as a performance evaluation. This is a tool to support decision-making regarding remote work arrangements.

Please respond to each statement ‘yes’ or ‘no’.

The employee:	Employee	Manager
Will be able to meet performance expectations, which are the same on and offsite		
Has the ability and desire to work remotely		
Has earned the trust of colleagues, managers, and customers		
Communicates proactively and effectively with managers, colleagues and, if applicable, direct reports		
Has good written and oral communication skills and keeps their manager and colleagues informed about their work		
Is independent and resourceful and can make good decisions		
Has demonstrated the ability to work with minimal oversight		
Can consistently complete tasks within the given deadlines		
Can comfortably use the technology needed to do the work		
Understands the job and has consistently met or exceeded performance expectations		
Has adequate technology and equipment to perform the essential functions of the job remotely		
Has demonstrated an understanding of departmental procedures		

If the answer to any of these statements is ‘no’, the employee may not be suitable for remote work at this time.

Step 4: Discuss the remote work request and the suitability assessments with the employee.

Before a manager makes a recommendation about the request, consider the overall needs of the team, and if any employee's will be disproportionately impacted by the decision. If so how can that impact be addressed?

Note the remote work approval or denial determination is made by the employee's Dean, Director, or Vice Chancellor (or their designee). This determination should be made based on the manager's and employee's individualized assessment and discussion of the employee's suitability for remote work.

[Active listening and constructive conversation tips](#) for tough conversations are available to support managers and employees.

Step 5: Advance recommendation to the Dean, Director, or Vice Chancellor (or their designee)

Follow your school/college/division process for advancing your recommendation to the Dean, Director, or Vice Chancellor (or their designee).

Step 6: Decision to approve or deny by the Dean, Director, or Vice Chancellor (or their designee).

If the remote work request is approved by the Dean, Director, or Vice Chancellor (or their designee), complete the Remote Work Agreement available online at the end of July 2021 on the [Remote Work: Guidance and Resources for Employees](#).

A checklist will be available mid-July to help you prepare to complete the Remote Work Agreement automated form.

If denied, managers should provide concrete feedback about why a proposal is denied to the employee. It may be because of a lack of sufficient detail about how, where, and when work will get done; a history of underperformance on the job; or simply that the job itself is not suitable for the kind of arrangement proposed by the employee. Whatever the reason, it is important to have candid conversations about the decision and about remote work.

Step 7: Implement and plan continuous communication and review of remote work agreement.

Remote work agreements should be reviewed and updated annually or less, or as warranted due to changes in work responsibilities, availability of equipment, or evolving workplace practices. During this review, divisional HR, the employee's supervisor, and employee will provide input to determine whether remote work continues to be appropriate, including whether it continues to meet operational needs. The Dean, Director, or Vice Chancellor (or their designee) will have final approval.

Checklist for ensuring success when managing remote employees.

Keep communication channels open:

___ Discuss and agree to how often and in what manner you and your remote employees will check in.

In some work environments, starting each day of remote work with a phone or video check-in may work best, while in other work environments, every other day or weekly may work best. The goal is to maintain enough contact so that you and your employee, and your employee and the rest of your team, are in sync with each other and on work projects.

Set expectations:

___ Communicate to your remote employees how often they should send workplan or progress updates, as well as what their updates should include.

___ In addition, you and your employee should know how quickly you are expected to respond to each other, and the best way to reach each other (phone, MS Teams, text, email, etc.).

Know the policies:

___ Review the [remote work policy and practices](#) overview and the related [remote work resources for supervisors](#) and [remote work resources for employees](#).

___ Verify that your employees have read and understood the information.

Review work schedules:

___ Confirm the employee's work schedule.

Remote work sometimes gets confused with workplace flexibility. Be clear about your expectations with employees for maintaining their current work schedule or if you are open to flexible scheduling based on employee needs.

Agree to a work plan:

Review the questions below with remote staff and work through answers together.

___ What routine responsibilities/tasks cannot be fulfilled while working remotely and how will it impact operations or other people? What are ways to reduce the impacts?

___ If they employee is working a hybrid schedule, what responsibilities should be done on-site, and which can be done remotely? What percentage of time will the employee be on-site and remote?

___ What routine responsibilities/tasks require regular communication and collaboration with others? Proactively contact each partner to confirm how you will communicate while you are working remotely.

___ Are there any special projects or tasks that you can advance while working remotely?

Engage in professional development:

___ Utilize the training provided at no-cost to support you and your employee's success.

The following courses are designed exclusively for managers and supervisors:

[Engaging in Tough Conversations](#)

[Reentry for Leaders with LifeMatters](#)

[Crash Course in Managing a Hybrid Team](#)

In addition, there are resources for all employees to explore and share with your team:

[Navigating Change: Colleagues Reuniting in the Workplace](#)

[Mind/Body Wellness with LifeMatters](#)

[Engaging in High Stakes Conversations with your Manager](#)

Check out additional [videos, toolkits, and classes](#).

Expect success:

___ Expecting success and trusting our employees to effectively work remotely are keys to making remote work arrangements successful and productive. Remote work presents an opportunity for managers to become better supervisors.

___ Instead of focusing on how many hours employees are working, focus on measuring results and reaching objectives—regardless of where the employee is working. The employee's completed work product is the indicator of success, rather than direct observation.

By focusing on the employee's work product, managers will improve their organizational abilities and their own skill in managing by objectives.

Resources Section:

[Remote Work Overview for Supervisors](#)

This document summarizes the purpose and main provisions of the Remote Work Policy.

[Remote Work Overview for Employees](#)

This document summarizes the purpose and main provisions of the Remote Work Policy.

[Remote Work Policy](#)

Complete policy located in the campus policy library.

[Reuniting Campus: Resources for Employee Success from Learning & Talent Development](#)

Resources to support the campus transition, including courses, videos, online modules, toolkits and assessments.

[Remote Work Resources for Supervisors from the Office of Human Resources](#)

Guidance and resources for all UW-Madison supervisors, including remote work agreement form, remote workstation ergonomic tips, technology, and links to other campus resources to support remote work.

[Remote Work Resources for Employees from the Office of Human Resources](#)

Guidance and resources for all UW-Madison employees, including remote work agreement form, remote workstation ergonomic tips, technology, and links to other campus resources to support remote work.

This document developed using resources from the Commonwealth of Massachusetts and the University of Washington.

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