Manager Work from Home (WFH) Suitability Assessment

Before a manager approves a work-from-home (WFH) arrangement for an employee whose job responsibilities can be effectively performed from home without negatively impacting operations or services, they are expected to conduct a thorough assessment of the following areas:

- Evaluate the employee's position to determine if the duties can be performed remotely;
- Ensure that the employee possesses particular traits conducive to WFH success;
- Assess if the employee has a sufficient WFH space and necessary resources.

Managers should use the checklist below to begin assessing all three areas. The bottom of this document provides evaluation tools to assist with your assessment. *This assessment is solely intended to determine the feasibility of an employee working from home at this specific time and should not, in any way, be considered a broader performance review.*

1. Is the position conducive for WFH? Please check all that apply.

❑ Job responsibilities that can be arranged so that there is no difference in the level of service provided to the customer (i.e. students, internal or external colleagues or partners)

❑ Job responsibilities that will not require the transportation of physical documents which may include personally identifiable information (PII), protected health information (PHI), or other confidential information

❑ Minimal requirements for direct supervision or in-person interaction with the customer (i.e. students, internal or external colleagues or partners)

❑ Low face-to-face communication requirements with the ability to arrange days when communication can be handled by telephone or e-mail

❑ Minimal requirements for special equipment (unrelated to an ADA accommodation)

❑ Ability to define tasks and work products with measurable work activities and objectives

❑ Ability to control and schedule workflow

2. Employees poised for success with a WFH arrangement are able to develop regular routines, prioritize and set and meet their own deadlines. Is the employee self-motivated, self-disciplined, and able to work and solve problems independently?

❑ Always　　　　　❑ Frequently　　　　　❑ Occasionally　　　　　❑ Rarely

Does the employee effectively manage time while generally completing projects on time with minimal supervision and feedback?

❑ Always　　　　　❑ Frequently　　　　　❑ Occasionally　　　　　❑ Rarely

3. Current job performance is a strong indicator of an employee's potential success with a WFH arrangement. Consider how any problems or professional development needs evident over the last performance evaluation period might affect the employee's WFH experience. Is the employee knowledgeable of job duties and does the employee have a track record of satisfactory performance?

❑ Always   ❑ Frequently   ❑ Occasionally   ❑ Rarely

4. For a successful WFH experience, the employee should have strong organizational and time-management skills and should be results-oriented. Does the employee have the ability to remain focused on work while WFH and not be distracted by television, housework or visiting neighbors?

❑ Always   ❑ Frequently   ❑ Occasionally   ❑ Rarely

5. The employee should be comfortable working alone and/or through tele/video conferences. Would the employee have the self-control to work neither too much nor too little and set a comfortable and productive pace while working at home?

❑ Yes   ❑ No

6. Employees in a WFH arrangement should have a good understanding of the departmental and organizational "culture." Is the employee knowledgeable about the university's procedures and policies; and has the employee been on the job long enough to know how to effectively complete assignments/tasks in accordance with the university's procedures and policies?

❑ Always   ❑ Frequently   ❑ Occasionally   ❑ Rarely

7. Is the employee an effective communicator and team player (i.e. communicates well with their supervisor and co-workers; able to express needs objectively and develop solutions; and has developed ways to communicate regularly with their supervisor and co-workers that can be used when in a WFH arrangement)?

❑ Yes   ❑ No

8. Is the employee aware of the below circumstances that promote a successful WFH environment?

   ❑ A comfortable work space where it is easy to concentrate on work

   ❑ The level of security required by the University

   ❑ The necessary office equipment, software, and sufficient Wi-Fi capability

   ❑ Household members who will understand the employee's work schedule and avoid disturbances

Evaluate Your Manager-Assessment

Is the position conducive to WFH?
- You should be able to answer affirmatively to each item under Question 1.

Does the employee exhibit qualities and work habits that would lend him/her to be successful in a WFH arrangement?
- If your answers to Questions 2 through 7 are "Always", "Frequently" or "Yes," the employee is likely to be successful at telework.

Does the employee have the right home environment?
- You should be able to check every item under Question 8.

NAME OF EMPLOYEE: _____

WFH timeline: _____ to _____

I have completed this assessment accurately and have reviewed the *Manager Checklist for Supporting WFH Arrangements.*

Manager:

_____   Date: _____
(Signature)

_____
(Print name)

PLEASE RETURN SIGNED COPY TO THE OFFICE OF HUMAN RESOURCES. THANK YOU