Improving Remote Supervision
Mon., Sept. 13, 2021 (3:25-4:30 pm)

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Training:

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Topics:

- ❑ **S**upervision & Performance Appraisal
- ❑ **I**mproving the Quality of Remote Supervision
- ❑ **C**onflict Management & Communication Skills
- ❑ **G**rant Writing Readiness: It Takes a Team!
- ❑ **G**rants Management
- ❑ **T**he Executive Director's Toolkit
- ❑ **T**he Fully Effective Nonprofit Board
- ❑ **P**reparing the Board for the Executive Director's Annual Evaluation
- ❑ **D**eveloping Exceptional Customer Service Skills
- ❑ **M**anaging Up: Strategies for Direct Care & Administrative Support Staff
- ❑ **C**ustom Topics within my expertise (upon request)

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Consulting:

- ❑ **E**xecutive & supervisory coaching & mentoring
- ❑ **S**upport for Organizational Culture Shifts
- ❑ **B**oard support: Executive Director Transitions, Onboarding, & Executive Director Evaluation
- ❑ **S**trategic planning & Annual Planning
- ❑ **M**eeting facilitation for strategic discussions & difficult conversations
- ❑ **P**itch me on other organizational needs

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What Do You Want to Bring Back to Discuss with Your Teams?

Priorities to Improve Remote Work

❖ What practices would you like to reset?

❖ What priorities do you want to accomplish?

❖ What training will benefit your staff most?

❖ What policies do you need to consider to make remote work function smoothly?

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The most reliable way to predict the future is to create it.

Abraham Lincoln

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"Never let a serious crisis go to waste. ...it's an opportunity to do things you thought you could not do before."

Rahm Emanuel
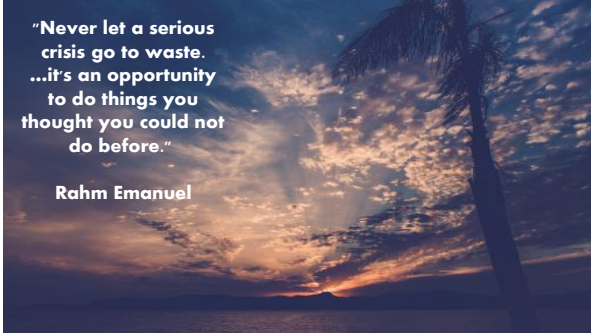
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Agenda

I. What are our goals around remote work?

II. Which Options Work Best for Our Clients, Employees, and Organization?

III. What's Working and What Are the Challenges?

IV. Identify Chains of Command & Support

V. Supervision Strategies (Communication, & Connection, & Oversight)

VI. Keeping ~~Remote~~ ALL Staff Connected

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What We'd All Like

• Better Work & Life Balance

• Stronger Work Relationships at all levels

• Community and Client Impact – Improving our Ability to Make a Difference

• Less Bureaucracy & Paperwork

• More efficient use of technology

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**Goals
For Navigating
Ongoing
Change**

1. To increase supervisors' capacity to support on-site & remote staff
2. To improve staff retention & reduce turnover
3. To create healthy work environments & work relationships for on-site and remote staff
4. To make work sustainable, i.e. guarantee "operational continuity"
5. To minimize organizational liabilities

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DEI Goals:

Making Sure Our Organizations Reflect the People We Serve

Who is Most Impacted by Covid19?

Which Workers Have the Least Access to Work from Home Options?

Last Hired, First Laid Off & Furloughed

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Which Options Work for Your Clients, Employees, Organization?	A	Hybrid Schedule – a blend of some remote/some office hours
	B	Employer Sets Staggered Shifts – schedules arranged to promote social distancing or client availability
	C	Employee Flex Scheduling – employees work based on the hours that fit their lives
	D	All Remote with periodic office visits
	E	All On-Site with occasional work from home

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What Criteria Should We Use?
It's based on your needs...and values
Best Practice: Involve your clients and employees

	Options	Flexibility for Employees	Meets Clients Availability Needs	Simplest for Supervisors & Administrators
A	Hybrid	✔	✔	✘
B	Employer Sets Staggered Shifts	✔	✔	✘
C	Employee Flex Scheduling	✔	✔ and ✘	✘
D	Majority Remote	✔	✔ and ✘	✘
E	Majority or all On-Site	✘	✔ and ✘	✔

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Productive Uses of Work at Home Time:
Direct Service Staff

Go paperless! Automate Client Applications/Intake/Onboarding

Telehealth Services (if your agency is set-up for it)	Call Clients & Check-in	Provide support and problem-solving	Develop case management resources	Program Planning!
Rethink How We Do Our Work	Online training in your field	Transfer your hard copy forms online	Community feedback surveys	Collect Stories about your clients
Update community Resources & Referrals	Engage your staff: What is a good use of WFH time	Develop Professional Networks (& Skills)	Census Data Mastery & Interpretation	Voter Registration

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Management, Fundraising & Marketing	Professional Development: *Online training – almost anything! *Online classes in excel, word, power point, access, Outlook+	Planning: *Annual & Strategic Planning! *Community feedback surveys
General: • Allow time for home office set-up * Allow time to research software and technology that will improve work-at-home communication and productivity	Go paperless! Automate HR, accounting & grants management	
	Develop Electronic Meeting Expertise: Master use of Zoom, Google Hangouts, instant messaging apps, etc.	Grants Management: Read your program grant manual Read your program's grant contract
		Public Relations/Fundraising: *Develop a power point presentation on your agency/tribe/organization(learn the program, too!) *Update your website!

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**Think of this time
as a Pilot for
Transforming the
Quality of Our Work…
And Our Life at Work**

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**Evaluate
Your Existing
Remote Work**

Which services/activities/functions are performed well remotely?

Which are not performed well? Why?

What are the pros and cons of moving to a system that offers more remote options to improve flexibility for clients and employees?

Are there cost savings?

Are there new costs to keep remote staff engaged?

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**III. Chain of Support
and Command**

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Clearly Identify Supports

Staff Roster on your server **(consistently updated)** + **PRINT copy snail-mailed**

       *Names & Office or remote location
       *Photos!!!
       *Email and phone contact
       *Bullet list of primary job duties (3-5)
       *Work hours
       *Include Employee Assistance Program (EAP), Human Resources, & Information Technology (IT) contacts

Agency resource list **(consistently updated)** **on the server** + **PRINT copy** with staff access via laptop, tablets, phones, etc.
       *Include referral Sources
       *Community Partners
       *State or national coalitions you work with

Key Vendors List???

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Clearly Identify Chain of Command

▪ **Identify who employees report to in your absence:**

    ■ IT needs
    ■ Time-off requests
    ■ Emergencies
    ■ Concerns & Grievances
    ■ Problem-solving help & support – which peers should be contacted

▪**Identify the immediate contact for workplace accidents** **[HR, Finance, +]**

▪ **Protocol for urgent needs & emergencies:**
    1) **T**ext you *and get a text back to confirm receipt* or
    2) **C**all you and reach you (i.e. no voice mails; they must call the department and reach a <u>human being</u> to ask that you be tracked down)

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III. Supervision Strategies – Connection, Support, & Oversight

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Do you ever feel like this?

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It doesn't make sense to hire smart people and then tell them what to do. We hire smart people so they can tell us what to do.

- Steve Jobs

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Measure Accomplishments, Not Activity

"It is important to manage expectations and stay focused on goals when embracing a remote workforce. Don't worry as much about what is being done. Instead, concentrate on what is being accomplished. If we are meeting our goals, then great. If not, we need to look into the situation further. **It is all about accomplishment, not activity**."

Donald Hatter, Donald Hatter, Inc.
https://www.forbes.com/sites/forbescoachescouncil/2018/05/30/top-15-tips-to-effectively-manage-remote-employees/#901fe17503cc

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"Understand the difference between being at work and working."
Henry Ford
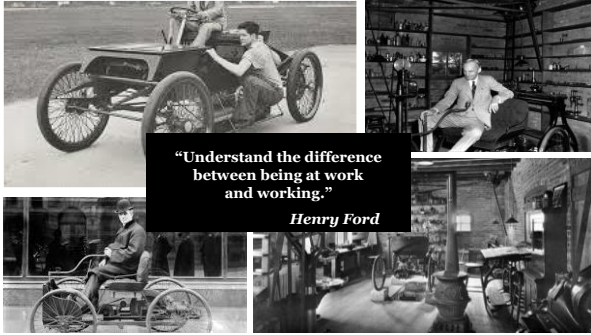
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How Do We Create Appropriate Supports to Help Staff Work Remotely?

Not All Staff Are Suited to Remote Work

Not all Staff Have the Home Set-Up for Remote Work

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Help Staff Structure Work

Questions to Discuss with Staff

- **What are your most important priorities?**
- **Which priorities need concentration/ focus?**
- **What responsibilities are appropriate for multi-tasking/interruptions**
- **What can be done outside?**
- **What can be done with minimal adverse consequences while children are home?**

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"Plan" for Success	
Challenges	**Options**
Childcare	1. 2. 3. 4.
Negotiating Private Space & Confidentiality Protections for electronic meetings & phone calls.	1. 2. 3.
Workspace & Furniture: Private Area, Desk, Locking Filing Cabinet, etc.	1. 2. 3.
Technology & Equipment: Landline phone, Ethernet connection, Double monitors, computer, printer, label maker, adding machine, etc.	1. 2. 3.

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Email is a Communication Tool...

Supervision

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What supports productivity?

The Basics

- **Hire Well!** Not every employee is cut out to work with limited supervision or create their own structure
- **Onboarding: High Quality Orientation & Training**
- **Manage the probationary period well!**
- **Supervise!!!**
- **Meet in-person when you have difficult feedback to share**
- **Evaluate your remote employees! Every year...on Time...In Person!**

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Supervising a "Mixed" Workforce

Prioritize team well-being to maximize Productivity...Intentional check-ins
Combine work hours flexibility with ground rules for "disconnecting"
Stay focused on accomplishments – not how every minute is used
Prioritize Connection
Worry about the right things

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Requirements for Supervisors

- **Create Trust & Be Reliable/Dependable** – Supervisors must respond swiftly when remote employees contact you
- **Be Transparent About Your Availability** – make sure staff know your schedule & communicate when you'll get back to them
- Create **Expectation Guidelines**

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Expectations for Staff Who Work Remotely

Email supervisor each morning upon arrival with top 2 priorities for the day and what they need from the supervisor
Emails need to be responded to within the workday - Frequency: check 1x? 2x? 3x/daily?
Text or email supervisor if sick or taking comp. time, leave to get a child at school, have an accident, etc.
Weekly: Email supervisor the top 3 priorities for the next week and supervisor support, tools, equipment, resources needed (*Note:* Send this by the end of each prior work week)

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Connecting with Individual Staff

- **Prioritize time for in-person contact** – you have to make some time available on a regular basis (bi-weekly perhaps) to be **on-site**

- **Daily Brief, Consistent Contact** – phone, email, Go To Meeting/Zoom Conferencing (otherwise problems can escalate)

- **Face-to-Face Coaching/Support** via Go To Meeting/Zoom – Create Employee Confidence in What You Think About Them

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Keep Up the "Normal Stuff"

- **Check in on #s served, outcomes, and whether the program/project will meet projections**

- **Regularly review time cards, case files, documents, & reports**

- **Professional Development & Training**

- **Routine calls & visits to community partners** – remote staff shouldn't be the sole "face of the agency"

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Frequency Outweighs Quality in Supervision

"They (the best team leaders) realize that it's less important that each check-in is perfectly executed than that it happens, **every week**. ...The more frequently and predictably you check in with your people or meet with your team—the more you offer your **real-time attention to the reality of their work**—the more performance and engagement you will get."

A Freethinking Leader's Guide to the Real World: Nine Lies About Work **by Marcus Buckingham and Ashley Goodall, Harvard Business Review Press, 2019**

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The 2-Question Weekly Supervisor's Check-In

• **What Are Your Top Two Priorities?**

• **How Can I Help?**

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The New Supervisor's Check-In

....

• **How are you doing?**

• **How's your family?**

• **How Can I Help?**

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Check-Ins ARE the Work of Supervisors

"...the weekly check- in is the anchor ritual. You need to design your teams, and their size, to enable it. And, if ever you become a leader of leaders, you'll need to ensure that your leaders know that **this check-in is the most important part of leading.** Checking in with each person on a team—listening, course correcting, adjusting, coaching, pinpointing, advising, paying attention to the intersection of the person and the real-world work—is not what you do *in addition to* the work of leading. **This *is* the work of leading.**"

A Freethinking Leader's Guide to the Real World: Nine Lies About Work **by Marcus Buckingham and Ashley Goodall, Harvard Business Review Press, 2019**

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Other Questions for Weekly Check-ins

• **Is the technology working?**

• **Have you identified any training you'd like to attend?**

• **Are you getting the support you need?**

• **What do you wish I knew about how you do your job?**

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Connectedness is Critical

• **Isolation** can kill employee interest in remote work

• It takes **intention and consistent effort**

• Employees must gather together **in-person at regular times**…**for social** *and* **work-related purposes**

• Personal relationships and mutual trust **foster collaboration**

• Make sure all staff have **a team** at their remote site

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Remote Staff MUST BE Part of the Team

• **Encourage team members to have regular contact**
• **Weekly or bi-weekly team meetings**
• **Prioritize participation**
• Periodically **schedule team & agency meetings** at remote offices
• **Equitable Access** to agency Training & Events
• **Cross-Office Mentoring** – foster connections among staff

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"Real-Time" & "Anytime" Communication

Type	Real-Time Is Best	Anytime Works
1-1 Supervision Meetings	✔	
Performance Appraisals – Probationary Period & Annual	✔	
Discuss Complex Issues	✔	
Problem-Solve	✔ and ✘	*Maybe* – depends on the issue
Building Relationships – social time	✔ and ✘	

Real-Time: Face-2-Face, Zoom, & Phone.
Anytime: Text, email, Whatsapp, Snapchat, etc.

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Make Your Messaging Apps Work Better

Set up channels with rules to eliminate digital clutter

Examples: Slack, Google Hangouts, HipChat

Ability to Talk with one or multiple people (open environment or privately)

Use Channel Options:

❖ Tech & other emergencies
❖ Client issues
❖ Service referrals
❖ Random chat (social stuff!)

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Communications Protocol

Creating the loop...Everyone:

• **Is present for & participates in virtual team meetings**

• **Reads the minutes sent by email after the meetings (whether they attended or missed the meeting)**

• **Contributes agenda items for team meetings**

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Communications Protocol 2:
Our Job is to Share Information

Add to Every Staff Job Description:
Consistently each week, all staff will share information that is critical to:

❖ Quality of program services for clients,

❖ Community partner and referral relationships

❖ Emergency procedures

❖ Financial accountability & legal compliance

❖ Public relations and fundraising/resource development

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The Day Must End

Support staff in setting workload boundaries (remember: on-call advocates have long periods of being on-call)

Support your remote advocates and staff in leaving work

Encourage (or set guidelines!) about turning technology off

Role Model Good Behavior -Don't send your staff emails or texts at all hours!

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Reliable Technology, Tools & Appropriate Polices
ARE ESSENTIAL

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ESSENTIAL Technology

How do you hold your IT provider accountable for excellent support to your remote sites?

- **Remote File Access -** ALL remote employees must have regular & consistent access **Paperless files are ideal for this**

- **Remote Desktops to Access Files Virtually** -GoToMyPC (GTMPC)

- **High speed internet** (reimburse for this)

- **Phone Service – VOIP with 4-digit dialing to reach any employee**

- **Voice mail to email system** (ask your phone & internet provider)

- **Microphone/speakers/headsets are required** so staff can hear reliably on calls & in meetings

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ESSENTIAL Tools

This includes space

Have **office space for meetings** – Privacy is important

A **private office or small conference room is required** for conference calls

Adequate furniture & equipment (copiers/faxes, locking file cabinets/laptops, tablets, & car lockboxes for staff who travel regularly)

Take **time zone differences (& shift differences)** into account – i.e. don't schedule calls outside their working hours

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Appropriate Policies for Remote Work

Ouch!

All policies need to be reviewed!

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Policy Considerations: Insurance(s)

Worker's Compensation Coverage – Does it cover home-based work, working from a car, partner agency sites?

Liability Insurance – does it cover multiple remote work environments?

Does your **workplace accident policy** cover your ability to visit an employee's home to investigate an injury? Is this clear to the employee when they start working from home?

Vehicles: Commercial auto insurance policy or "hired and non-owned policy (HNOA)"? Does your organization pay the difference? What do each cover? Is this known to the employee?

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Policy Considerations: Client & Employee Protections

- **OSHA** – do you check out remote office facilities, staff homes? Do you require hired & haul auto insurance?

- Will you **inspect telecommuter's home offices** for safety conditions, including ergonomic safety?

- **Confidentiality** – email, internet, paper files – do your policies cover remote work situations?

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We are so desperately needed. Because this should be a world where everyone has a decent place to live.
It should be a world where we care for each other, where we recognize that we are all connected, and where we come together in times of crisis —and stay together when the urgency has lifted but the need remains.

Jonathan Reckford
Habitat for Humanity

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Bringing This Back

◆ **Coffee Date – Be a Continual Learner**
◆ **Review your "Priorities Worksheet" Notes**
◆ **Read Your Resource list & Follow Links**
◆ **Engage Your Staff**
◆ **Talk to Your Colleagues & Management**

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There's something in you that the world needs.

* Stay Safe! Stay Healthy!

* Take Care of Your Yourselves & Your Staff!

* Get your flu shots!

Miigwech!

Gracias!

Thank You!

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