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DEPARTMENT OF ECONOMIC SECURITY

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*Your Partner For A Stronger Arizona*

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Supervising a Remote Workforce

Division of Adult and Aging Services

Adult Protective Services

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Facilitator's Guide

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Revised: 03/19/2021

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# Equal Opportunity Employer/Program

Equal Opportunity Employer/Program Under Titles VI and VII of the Civil Rights Act of 1964 (Title VI & VII), and the Americans with Disabilities Act of 1990 (ADA), Section 504 of the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, and Title II of the Genetic Information Nondiscrimination Act (GINA) of 2008, the Department prohibits discrimination in admissions, programs, services, activities, or employment based on race, color, religion, sex, national origin, age, disability, genetics and retaliation. The Department must make a reasonable accommodation to allow a person with a disability to take part in a program, service or activity. For example, this means if necessary, the Department must provide sign language interpreters for people who are deaf, a wheelchair accessible location, or enlarged print materials. It also means that the Department will take any other reasonable action that allows you to take part in and understand a program or activity, including making reasonable changes to an activity. If you believe that you will not be able to understand or take part in a program or activity because of your disability, please let us know of your disability needs in advance if possible. To request this document in alternative format or for further information about this policy, contact: **[Insert Division/Administration/Program Name and Number]**; TTY/TDD Services: 7-1-1. Free language assistance for DES services is available upon request.

# Forward to Instructor

As the leader of this training, your professional demeanor will play an important part in how an employee perceives the Division or Program for which you are providing this training.

The quality of the training an employee receives may have far-reaching implications for both the individual employee and the organization, from job performance and on-the-job training time, to employee retention, and possibly turnover. As the Instructor, you are in a position to contribute to the success of this and other trainings.

Here are a few suggestions to help facilitate a successful class:

1. Do not stray from the curriculum provided in the online session materials. Even if you may disagree with a policy or procedure, know a “shortcut”, or have worked at an office that did things in a different way than what is stated in the material, do not alter the materials. To keep the training message consistent, please follow any policy and procedures cited as written in this manual. If you do not agree with something, please bring it to the attention of your Training Manager *before* training.
2. Be prepared and ready to welcome your Participants by having the online session materials ready to go at least 30 minutes prior to class start time.
3. Always start and resume class on time.
4. Dress professionally, even if it’s a “casual day”.
5. Know the material and study its origins and applications.

# Facilitation Information

## Facilitator Guide

The Facilitator Guide is designed to be a comprehensive roadmap through this training module. Use it as your key navigation tool and your prompter. The layout of the Facilitator Guide provides notes and icons to aid training facilitation. This guide provides complete scripting for facilitators who may need more support in teaching this particular topic; however, flexibility is expected for facilitators already familiar with the subject matter.

## Participant Guide

The Participant Guide is designed to be used to take notes during the training. Throughout the Participant Guide there are places for the learner to fill in the blanks. The corresponding Instructor Guide page contains all of the appropriate answers for these as well as solutions to the various exercises.

## PowerPoint Presentation and Hardware

A PowerPoint presentation is included as part of this training program. Follow the class set-up checklist to confirm that the required equipment (computer, projector, etc.) is working properly.

Note: While very helpful, the PowerPoint presentation is not a vital part of the training materials. This training can be facilitated solely from the Participant and Facilitator Guides.

## Activity Materials

This course is designed to be delivered in an on-line format utilizing the tools available through ZOOM. As such, the facilitator and the producer should both be oriented to how to launch and utilize the tools available in ZOOM. In this course, you will be using the following functions:

- The “Share Screen” Option
- The Chat Box
- Breakout Rooms
- The annotation functions, specifically the stamp and text tool

This guide provides specific instructions for the producer and the facilitator. However, it can be facilitated by one person and both the producer and facilitator should be able to fill both roles should the need arise. To reduce the possibility of any problems arising, both the facilitator and the producer should:

- Ensure the most recent version of ZOOM is installed
- Practice using the needed tools after an update to ensure functionality
- Practice in both roles so as to be prepared for any technical issues
- Ensure you facilitate from a high speed connection, preferably directly connected to a server instead of just WIFI
- Practice utilizing multiple screens. If available, having more than one screen allows for quick access to the PowerPoint, Facilitator’s Guide and ZOOM interactive tools

**Note:** ZOOM offers a wide variety of training videos concerning their product. Make sure both the producer and the facilitator are both trained on how to navigate this tool. For more information go to the ZOOM Website and click the [“Resources”](#) Tab at the top of the home page. Even though this particular curriculum was designed with the ZOOM platform in mind, there are numerous platforms available for use (e.g. GoToMeeting, BlueJeans, Microsoft Teams, Google Meets, etc.). You will need to adapt the curriculum to meet the limitations of the platform you choose to use.

## Preparation and Setup

Actions to complete prior to beginning of class:

- 1) Create Zoom link for the session and send it to all participants both as an e-mail and an appointment when possible. In both communications provide a number where you can be reached by text in the event of technical problems. Also include their participant’s guide as an attachment. In all

communications remind them to have a printed copy for them to use during the session.

- 2) Prepare the ZOOM Polls that will be used during this course. These include:
  - a. How long have you supervised a remote workforce
  - b. The biggest challenge faced when onboarding staff
- 3) Send an e-mail reminder the morning of as well as 1 Hour prior to the session. Encourage people to log in 15 minutes early, especially if they are uncomfortable with technology.
- 4) Launch ZOOM Meeting and PowerPoint 30 minutes prior to the session. Prepare to welcome guests and troubleshoot technical issues as people arrive.
- 5) As people arrive, ensure their name is displayed. You may also choose to have them update their name with their location. Example: “Michael Curtis, Tyler Texas”

## Course Description

This 4-hour online course was developed to provide supervisors resources and ideas for managing a mobile workforce. It is the result of many districts being required to supervise remotely due to the COVID 19 crisis of 2020.

Supervising a Remote Workforce is a 4-Hour workshop designed to be delivered using Zoom or a program with similar capabilities. It can easily be adapted to a classroom environment. It is designed with the following considerations in mind:

- Facilitated to be highly interactive.
- Designed to draw of the knowledge of current supervisors.
- Designed for a class size of approximately 25 staff.
- Designed with a post class reading assignment with a 1-Hour follow-up webinar.

## Course Goal and Objectives

Upon completion of this course the participants will:

- Explore the benefits and challenges of a remote workforce.
- Understand the importance of effective communication in a remote workforce.
- Develop a written communication plan for their unit.
- Learn best practices for onboarding staff in a remote environment.
- Identify the five factors that contribute to performance issues and apply that knowledge to a performance scenario.
- Apply one best practice of team building in a remote environment and report result back to other course participants.

## Target Audience

Supervising a Remote Workforce was developed for front line APS Supervisors and their managers.

## Lesson Length – (5 Hours Total)

The initial Zoom Based training will take approximately 4 Hours. Afterwards, an independent reading as well as a follow-up webinar will provide an extra 90 minutes of training.



# Use of this Guide

## Facilitator Prompt Key

**Say:** Provides the course material to be covered. Facilitator can use either as a script or can express the information in a manner of their choosing as long as no points are altered or omitted.

**Ask:** Pose the provided question and facilitate discussion. **Transition:** Provides a script for moving between subjects. As with







“Explain,” there is some flexibility.












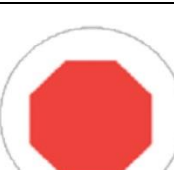

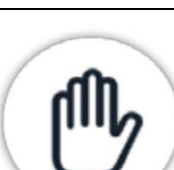
**For the Producer:** Provides instructions for the producer to take an action or prepare for an action that is pending.

**For the Facilitator:** Indicates when facilitator needs to “do” something.

## Icon Key

Key to icons used throughout the *Facilitator’s Guide*.

	Ask a Question		Breakout Rooms
	Caution / Warning		Check with Participants
	Debrief (correct response, listen for or facilitate discussion)		Demonstrate

	Distribution / Handout		Zoom Annotation
	Keying		Launch Video
	Notes / Paper Exercise		Open Document
	Point Out		Policy
	Policy Reference		PP Slide Advance
	PP Slide Animation Advance		Stop
	Timed Activity		Volunteer

# Use of this Guide

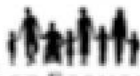

This side bar will contain icons that indicate routine actions and help the Facilitator and/or Producer recognize when activities occur. In this case, the icon is telling the Facilitator to advance to the next slide.

## Welcome

**INSTRUCTOR:** Leave the title slide up until you are ready to begin. Once everyone is settled in, introduce yourself and the course.

PP Slide: Course Title

Supervising a Remote Workforce  
APS Supervisor Training



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DAAS - Division of Aging and Adult Services

## Unit 1 - Introductions/Ground Rules

**Unit Objectives:** Upon completion of this unit, Participants will be able to:

- Identify other Participants in the session.
- Navigate the use of Zoom as the platform for this training.
- List the basic content for this course.

**Estimated Time:** 20 Minutes

**Activity #1: Welcome and Introductions – Lecturette, Breakout Rooms, Chat**

The content box provides the title of the section / topic, a view of the current PPT slide, the course content, and Facilitator and/or Producer prompts.

Text boxes will be used for special notes or to indicate when the Facilitator and/or Producer need to do something in particular.

## Timeline

Timeline (Minutes)	Unit	Brief Description
20 Min.	Unit 1 – Introductions/Ground Rules	Introduce Participants, meeting platform (Zoom), course basics, and ground rules.
30 Min.	Unit 2 – Supervising a Remote Workforce	What is a remote workforce with benefits and challenges?
5 Min.	Break	
40 Min.	Unit 3 – Onboarding Staff in a Remote Environment	Share best practices in onboarding new staff remotely.
5 Min.	Break	
45 Min.	Unit 4 – Effective Communications in a Remote Workforce	Discuss different methods of communication and the pros and cons of each.
10 Min.	Break	
30 Min.	Unit 5 – Scheduled Meetings	Identify the need for, and share best practices in, facilitating meetings
40 Min.	Unit 6 – Performance Management	Identify root causes of performance issues and how to assess developmental needs.
10 Min.	Unit 7 – Wrap-up and Commitment	Commit to at least one activity in the next 30-60 days.
5 Min.	Homework – Developing and Maintaining the Team	Share how to develop and maintain a closer team remotely.

Timeline (Minutes)	Unit	Brief Description
90 Minutes	Booster Activity	Follow-up “Lunch and Learn” Activity held 30-60 days after the initial course.

## Welcome

**INSTRUCTOR:** Leave the title slide up until you are ready to begin. Once everyone is settled in, introduce yourself and the course.



### PP Slide #1: Course Title



## Unit 1 - Introductions/Ground Rules

**Unit Objectives:** Upon completion of this unit, Participants will be able to:

- Identify other Participants in the session.
- Navigate the use of Zoom as the platform for this training.
- List the basic content for this course.

**Estimated Time:** 20 Minutes

## Activity #1: Welcome and Introductions – Lecturette, Breakout Rooms, Chat

**INSTRUCTOR:** “Where do you plan to take your next vacation?” This will be used as an introductory activity and to explain how to use the interactive tools in Zoom.



### PP Slide #2: Your Next Vacation



**INSTRUCTOR:**



**Say:** *Good morning everyone, we are going to get started. As we start, we want to introduce you to the Zoom interface we will be using today.*

*On your screen you should see three images, one represents the mountain air, one represents the sea and sand, and one represents world travel. You should also see an interface block for Zoom. It is*

likely at the top, center of your screen and says something like “You are viewing someone’s Screen.” To the right of this statement, there is a tab that says “View Options.” When you choose the View Options tab, you will see a number of options. One of those options is “Annotate.” Select the Annotate option now.

Once you choose this option you can annotate directly on the Instructor’s screen. Let’s practice now by using the Stamp option to put a heart, star or other stamp next to the image that best describes your next vacation.

**INSTRUCTOR:** Give everyone a few minutes to make their annotation and then move on.

**PRODUCER:** Prepare to break Participants into Breakout Rooms of 3-4 people.

**INSTRUCTOR:**



**Say:** *OK, it looks like we have some nice vacations planned.*

*During this course, we will be working in small groups from time to time. To do this, we place you in virtual Breakout Rooms. Let’s practice this now. Our Producer has already separated you into Breakout Rooms and in a few moments, you will be placed into those rooms along with your other small group Members.*

*We are going to give you 5 minutes to talk in your Breakout Room. During that 5 minutes, each member is to share where they will be going on their next vacation and why it appeals to them.*

*In the event you have any problems, you will see a button that*





*allows you to call for an Instructor. If you have any issues with that option, just give us a call at \_\_\_\_\_. In the event you have significant issues, the best solution may be to log out and then log back in.*

*We will be placing the instructions for small group activities into the Chat (see production worksheet) each time we place you into a room. Does anyone have any questions before we break you into small groups?*

**PRODUCER:** Send everyone to their Breakout Rooms and cut and paste the instructions into the Chat. After about 3 minutes, let them know they have 2 minutes remaining. The system will automatically give them a 1-minute warning

**INSTRUCTOR:** When everyone returns from the breakout,



**Say:** *Welcome back from your first breakout. Did anyone change their mind about their vacation and decide to go with someone else on theirs? Use the Chat function and let me know if you will be going with someone else or sticking with your own plans. The Chat function can be found at the bottom of your Zoom screen on the Zoom menu bar. It's icon that looks like a callout square.*

*So far, we have practices annotations, Breakout Rooms and Chats. These are the primary tools we will be using during this training.*



**Ask:** *Did anyone have any problems while in the Breakout Room?*



**INSTRUCTOR & PRODUCER:** Discuss any problems and try and resolve them before the next breakout.

**INSTRUCTOR:**

**PP Slide #3:** Course Goal and Objectives (PG Page 1)

## Course Goal and Objectives

The goal of this training is to better equip supervisors to manage staff in a remote work environment.

Regarding a remote workforce, Participants will:

- |  |   |
|--|---|
| • Explore the benefits and challenges. | • Learn best practices for on-boarding. |
| • Understand communication.            | • Identify performance issues factors.  |
| • Develop communication plan.          | • Apply team building best practices.   |

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**Say:** *Now that we know how to use Zoom, let's take a moment to explore what we will be covering today. During this course, we will:*

- *Explore the benefits and challenges of a remote workforce.*
- *Learn the importance of effective communication in a remote workforce.*
- *Develop a written communication plan for their unit.*
- *Learn best practices for onboarding staff in a remote*



*environment.*

- *Identify five factors that contribute to performance issues and apply that knowledge to a performance scenario.*
- *Apply one best practice of team building in a remote environment and report result back to other course Participants.*

***Say:*** *In a follow-up class you will be exploring:*

- *Activities that will help establish and maintain the team.*

## Unit 2: Supervising a Remote Workforce

**Unit Objectives:** At the completion of this unit, Participants will be able to:

- Understand that systemic changes may be needed to fully realize the benefits for a remote environment.
- Identify at least one way they will need to adapt to be a better Supervisor of a remote workforce.
- Identify the benefits and challenges in supervising a remote workforce.

**Estimated time:** 30 minutes

### **Activity #1: How Long Have You Supervised a Remote Workforce – Poll**

**INSTRUCTOR:** As an introduction to this topic, have the Producer launch the Poll as indicated below. Have everyone choose one response. In the event there is any confusion, simply have them choose the best response. Give Participants about 15 seconds and then say: “You have about 15 more seconds to choose your answer.” The Producer should close the Poll at the 30-second mark.



**PP Slide #4:** How long have you supervised a remote workforce?  
(PG Page 1)

## Let's Take a Poll...

How long have you supervised a remote workforce?



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**PRODUCER:** When introduced, launch the following Poll and give everyone about 30 seconds to answer. The Instructor will provide a 15 second warning.



**Poll:** How long have you supervised a remote workforce (choose the best answer)?

- Over 10 years
- 5-10 Years
- 2-4 Years
- Less than 2 years
- Since COVID



**INSTRUCTOR:**

**Say:** *"You have about 15 more seconds to choose your answer."*



**INSTRUCTOR:** Debrief the results of the Poll and then continue to the next activity.

**Possible Debrief:** The point of this question is to point out that there is a lot of experience already in the room. In this group alone we have years of experience that can be discussed in this class. Please pitch in whenever you have something to add as everyone can benefit from your experiences, positive experiences or challenges.

**Activity #2: You Have Always Supervised a Remote Workforce – Lecturette**

**INSTRUCTOR:**



**PP Slide #5:** How long have you supervised a remote workforce?  
(PG Page 1)



## Remote Workers

### Key Concept



APS Workers have always worked away from the office.

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**Say:** *Adult Protective Service's (APS) Investigators were at least partially remote prior to COVID. Much of their work was done away from traditional offices and tight control structures. Due to COVID, we are now remote in ways we could not have fathomed in years past. This requires us as Supervisors and Managers to adapt our methods of managing to meet the needs of our staff.*

*One of the first things you can do to engage in this paradigm shift is to change your definition of work. In one of the early papers on managing effectively in a remote environment, early experts pointed out that work is something you do, not somewhere you go. In the 20th century, when a person said they were "going to work" they meant they were "going to the office, platform or warehouse." In a digital age, many of our jobs simply no longer require a central location from which to operate. In fact, almost every task an APS worker completes on a day-to-day basis can be accomplished with two pieces of equipment; a properly equipped computer and a portable printer.*

*Remote working provides a wide variety of benefits, which we will be discussing in a moment. It also provides a wide variety of challenges that a forward-looking Supervisor and Manager will need to be considering today. After COVID, it is likely that many*

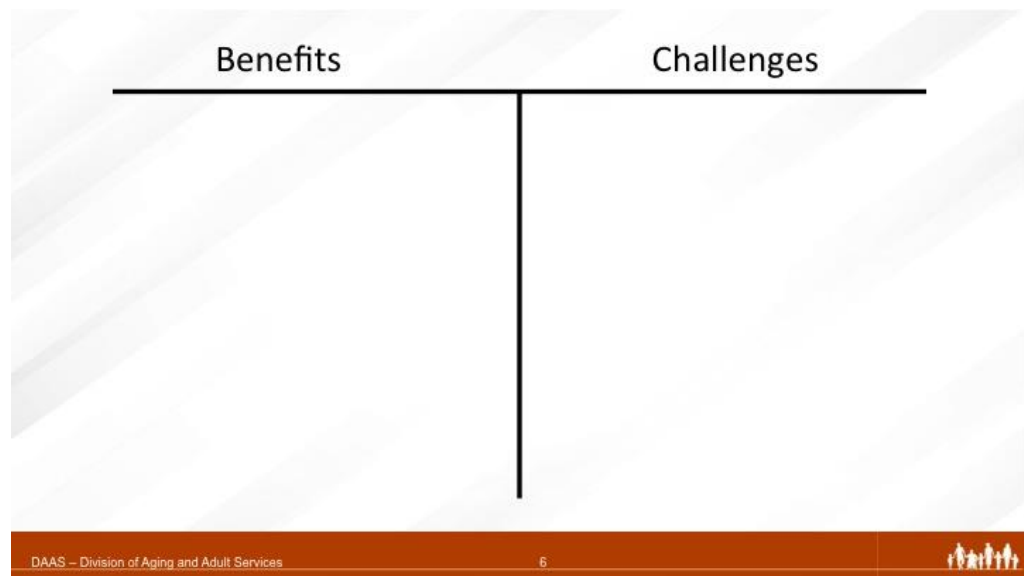
*organizations will return to some level of office attendance. However, that might not be the case for your organization.*

### **Activity #3: Benefits and Challenges – Virtual Whiteboard**

**INSTRUCTOR:**



**PP Slide #6:** Benefits and Challenges (PG Page 2)



**PRODUCER:** This activity will require participants to use the Annotation feature of Zoom to document directly onto the displayed PowerPoint (see above). Once the display is complete you will need to clear the annotations before moving to the next PowerPoint.



**INSTRUCTOR:**



**Say:** *Let's take a few minutes to explore both the benefits and challenges of a remote workforce. Turn to page 2 of your Participant's Guide and write at least two benefits of working remotely and two challenges of working remotely. In a second you will be using the "annotate function" in Zoom to share one of your answers with the rest of the class.*



Give them 60 seconds to make notes in their Participant's Guide.



**Say:** *Let's talk about the benefits of a remote workforce first. Using the annotate tool, choose the text option. Then, find a place on the PowerPoint and write one of your benefits. Try to use only one or two words. There are a lot of people writing on the same screen.*



*You will have a few seconds to write one benefit on the screen.*



**INSTRUCTOR:** Give Participants 30 seconds to answer the question on the slide. If no one writes anything, write "Work-Life Balance" on the whiteboard to give an example. Other answers may be:

- Increased Flexibility and Freedom – Increase in worker satisfaction.
- Reduced Overhead Costs – Less office space needed.
- Better Services to Clients – More time in the field.



**INSTRUCTOR:** Debrief the activity. In the event you need clarification, have the person who wrote something down raise their virtual hand and then, unmute them so they can expand. This prevents people talking over one-another.



**Say:** *Now, let us do the same thing with the challenges. Using the tools associated with the whiteboard, on the right side of the T-Chart shown on the screen, write one to two words that can be used to remind us of the challenges of working remotely. Again, if you accidentally overwrite someone, don't worry, we can move the text around so we can all see everyone's answers.*



*You will have a few seconds to write one to two challenges on the screen.*



**INSTRUCTOR:** Give Participants 60 seconds to answer the question on the slide. If no one writes anything, write "Working After Hours" on the whiteboard to give an example. Other answers may be:

- Worker Isolation – A remote workforce can create a significant challenge in regard to worker isolation. Introverts may become even more introverted and the lack of team interaction can undermine the team leading to poor work performance, poor morale and, in some cases, depression.

- **INSTRUCTOR (*continued*)** Lower team spirit for units who are used to working together – When workers came into the office, they were able to see their coworkers, share trials and tribulations, and discuss cases with their Supervisor. Those contacts, which took place naturally in the office, are no longer there. This can lead to isolation, miscommunication and in some cases depression and anxiety.
- Reduced Productivity and Lower Quality of Work – Without someone making a conscious effort to remain connected, focus on outcomes, and give feedback concerning work, people may allow actions to be overlooked. This can result in reduced productivity and poorer outcomes for our clients.
- Boundaries – Having a workspace at home can create a substantial temptation to work after hours. The pressures of the work we do, and the timelines associated with documentation, can have workers documenting and sending e-mails at all hours of the day and night resulting in exhaustion, burnout, and poor performance.



**INSTRUCTOR:** Debrief the activity. In the event you need clarification, have the person who wrote something unmute themselves so they can expand. Make sure the content bulleted above is covered as it sets the stage for the remaining content included in the course.

## Activity #4: Good Supervision is the Key – Lecturette

### INSTRUCTOR:



**PP Slide #7:** Keys to Effectively Supervising a Remote Workforce  
(PG Page 2)

### Keys to Effectively Supervising a Remote Workforce

- Defining Clear Goals
- Aligning Resources and Strengths
- Establishing Trust
- Monitoring and Feedback
- Celebrating Accomplishments
- Developing Staff



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**Say:** The supervisor is *key to successful operations in a unit. By engaging in activities that keep people engaged, build the team, and ensure accountability, a unit can reap the benefits of working remotely without suffering the consequences. This requires excellent communications and relations within the unit and with the Supervisor's Manager. A Supervisor organizes people and tasks in a way that achieves the specific goals of the organization. They do that through:*

- *Defining goals and expected outcomes clearly.*

- *Aligning resources/employees so the unit's strength is brought to bear on specific tasks.*
- *Establishing trust through consistency, competence and good communication.*
- *Monitoring progress and providing feedback during the process.*
- *Celebrating accomplishments throughout the process until goals are achieved.*
- *Developing staff today so that they are equipped to meet the goals of tomorrow.*

*In a remote environment Supervisors have to remain laser focused on the tactical day-to-day activities that accomplish the mission of the agency. Without leaders, organizations may "do a lot" but not go anywhere worth going. Without Supervisors, leaders can dream big but have no one to direct the resources needed to get them there. In a remote environment, Supervisors are the key to accomplishing the mission and vision of the organization.*

*This means that Supervisors must:*

- *Understand the expectations of the organization clearly.*
- *Understand the skills and capacities of their unit clearly.*
- *Have the skills needed to evaluate performance towards a goal.*
- *Have the relationship required that allows them to give quality feedback.*
- *Take the time to celebrate short-term and long-term goals, both individually and as a team.*
- *Make the commitment to continually develop their team.*

*In the current environment, they must overcome some of the challenges of a remote workforce to do so.*

**Transition:** *In this course, we are going to discuss how to be more effective in leading and supervising a remote team. Before we do so, let's take quick break. I will set a timer for 5 minutes and will ask you to be back on the meeting at that time. Before I start the clock, does anyone have any questions?*

**INSTRUCTOR:**

**PP Slide #8: Break**



**Break – 5 Minutes**

## Unit 3 – Onboarding Staff in a Remote Environment

**Unit Objectives:** At the completion of this unit, Participants will:

- Create a list of obstacles in onboarding new staff for leadership to address if possible
- Share best practices concerning onboarding and training new staff.
- Choose one practice they can implement immediately to improve onboarding of staff.

**Estimated Time:** 45 Minutes

### Activity #1: Biggest Challenge – Poll



**PP Slide #9:** What is the biggest challenge you face onboarding staff? (PG Page 3)

### Let's Take a Poll...

What is the biggest challenge you face onboarding staff?







**PRODUCER:** During the break, prepare a Poll to survey Participants when they return from break with the following question and options. When introduced, launch the Poll and give everyone about 30 seconds to answer. The Instructor will provide a 15 second warning.

**Poll:** What is the biggest challenge with onboarding new staff in a remote workforce?

- Establishing your relationship with the new team member.
- Ensuring team members are properly trained.
- Issuing equipment to the new team member.
- Integrating the new team member into the larger team.
- Completing the necessary paperwork required to onboard staff into the agency.
- Other, please expand.

**INSTRUCTOR:**



**Say:** *We are going to launch a poll. When you see it, choose which of the issues listed are the biggest challenge you face when onboarding new staff.*



**INSTRUCTOR:** Debrief the activity.





**Say:** *If there are any additional issues you are aware of, unmute yourself and share with the rest of the class.*

## **Activity #2: Best Practices – Breakout Rooms**

**PRODUCER:** As the Instructor gives directions, prepare to break Participants into Breakout Rooms of 3-4 people. Groups can be randomly generated.

### **INSTRUCTOR:**



**PP Slide #10:** Best Practices in Onboarding Staff (PG Page3)

### **Best Practices in Onboarding Staff**

- Break into groups.
- 15 minutes to Compile your Presentation.
- You may choose to use PowerPoint or Word.
- Google is Your Friend.
- Person with the Most Pets Reports for the Group.



Participant Guide Page 3

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**Say:** *The Producer will be breaking everyone into random groups. As a team, you will work together to create a brief presentation to present back to the large group concerning the best practices you have used to onboard new staff. This includes activities you may have used or want to use to:*

- Establish effective relationships with your new team members.
- Help the new team member establish relationships with others on the team.
- Obtain necessary equipment.
- Train new staff.

*When you return to the larger group, the person in your group with the most pets will report your discussion back to the larger group. If you like, you can create a flip chart to present your information back by using Word, PowerPoint or another program of your choice. When your turn comes to report back, we will make you the presenter.*

*Remember, you have some time to research, so Google is your friend.*



*You will have 15 minutes to discuss and compile your presentation. Each presentation should be about 5 minutes. Does anyone have any questions prior to breaking into groups?*



**PRODUCER:** Break the class into groups and start a timer for 15 minutes. Cut and paste the instructions from above into the Chat for the teams to reference. At the 5-minute mark, send a Chat to all groups that they have 10 minutes remaining. At the 10-minute mark, send a Chat to all groups that they have 5 minutes remaining. Finally, at the 13-minute mark, send a Chat that they have 2 minutes remaining. The Zoom system will give them a 60 second countdown before they return to the larger group.



**INSTRUCTOR:** As the breakout groups return, welcome them back and ask for a team to volunteer to be the first to present. To ensure you can complete this unit timely, make sure to limit teach backs to about 5 minutes each. Encourage Participants as they teach the content back with statements like, “That’s a great idea.” or “Genius, who came up with that one.”

### Activity #3 – Suggested Approaches– Lecturette



**INSTRUCTOR:** After each group has provided their presentation, make sure the following ideas are presented. If you decide to reinforce some of the content previously presented, make sure you give credit to the team for already discussing some of the content. For instance, if Team 3 gave the idea of a virtual meet and greet for new staff, you might say “As Tommy stated when he presented his team’s ideas, a virtual meet and greet for new staff is a great way to help the new staff member get to know the team and feel welcome.”



**PP Slide #11:** Onboarding Best Practices (PG Page 3)

## Onboarding Best Practices

- Hold a Virtual Meet and Greet.
- Develop an Onboarding Plan with Clear Milestones.
- Assign a Mentor.
- Create a Welcome Pack.

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**Say:** *Thanks everyone for these great ideas. Let me share a few that we came across in our research.*

- *Virtual Meet and Greet* – *Set aside some time towards the end of the new employee’s first week for a virtual meet and greet. Make this a fun event of about 30-45 minutes*

*with no other agenda item other than to introduce the team to the new employee. Have each team member create one or two slides in PowerPoint or a similar program with pictures of family, hobbies, places visited, etc. You can also ask a “mixer” question that helps the new employee get to know the team. A few examples are:*

- If you could have dinner with anyone, alive or dead, who would you have dinner with and why?*
- What was your favorite trip and why?*
- If you could visit any place on earth, where would you go and why?*
- What is your favorite show to binge watch and why?*
- What is your favorite board or video game and why?*
- What is one of your core values and how would we see that exhibited in your life?*

- *Develop an Onboarding Plan with Clear Milestones –*  
*Create a written plan for onboarding staff with clear milestones. Current onboarding plans can be adapted, if they exist. If they do not, work with your management team to create a plan which includes milestones for:*

- Unit Orientation – Meet the Supervisor and the team either in person or remotely.*
- Equipment Orientation – Identify when will they get their equipment and how they will be oriented/trained on its use. Will they be receiving protective equipment and if so, when? How do they order more if needed? Who do you call if equipment breaks or is lost?*

	<ul style="list-style-type: none"> <li>○ <i>Training Milestones – Break training into small chunks and outline when the content will be covered and by whom. Review weekly until training is complete.</i></li> <li>● <i><u>Assign a Mentor</u> – A Mentor can be the key component of helping a new employee navigate a new job. The Mentor should be aware of the onboarding plan and have some responsibility in helping the new employee navigate that plan. The Mentor can also model tasks and skills for the new employee as part of their training.</i></li> <li>● <i><u>Create a Welcome Packet</u> – Create a welcome packet that can be distributed electronically to new remote employees. Ideally, this should be sent before their first onboarding session and can include information such as:</i> <ul style="list-style-type: none"> <li>○ <i>Name, phone number and e-mail of their team members, Supervisor and Manager.</i></li> <li>○ <i>Links to training videos that might be helpful in their first few days. These can address issues such as:</i> <ul style="list-style-type: none"> <li>● <i>How to log into your computer system.</i></li> <li>● <i>How to record and submit travel reimbursements.</i></li> <li>● <i>How to complete the HR onboarding process.</i></li> <li>● <i>Information concerning the structure of the organization.</i></li> </ul> </li> <li>○ <i>Information concerning how to navigate to and access online accounts needed to do their job. Ensuring</i></li> </ul> </li> </ul>
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*information security is critical in this process but including links and temporary passwords in the welcome packet can help ensure quick access for the new employee.*



**PP Slide #12: Onboarding Best Practices (Cont.) (PG Page 3)**

## **Onboarding Best Practices (Cont.)**




- Check in Regularly.
- Share the Training Workload.
- Assign “Aged” Cases First.

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- *Check in Regularly* – *A daily meeting with your new staff can have significant returns in the long run. While costly for you as a Supervisor, checking in daily and asking questions about what they did or what they learned helps reinforce training, holds them and their Mentor accountable, and makes them feel supported. It also helps a Supervisor and new employee establish a strong working relationship and trust. Think about a daily check-in their first month and then a twice weekly check-in for the next month. If all is well after 60 days, then move them to a less frequently scheduled one-on-ones (more about that later). If you have more than one new employee, meet with them together during their first 60 days.*

    	<ul style="list-style-type: none"> <li>● <u>Share the Training Workload</u> – Work with other Supervisors who have a new employee and consider training staff together. Topics can be divided between Supervisors to lighten the load for each. Working with a cohort of new employees also helps them build relationships within the organization.</li> <li>● <u>Assign New Trainees “Aged” Cases First</u> – Giving the new employee “aged” cases, cases in which initial time frames have already been met, can help a trainee practice new skills without the immediate pressure of timelines. Having them help visit clients who have not been seen due to a vacant caseload helps them learn to establish rapport, assess safety, and case plan without the immediacy of deadlines and timelines.</li> </ul> <p><b>Ask:</b> Are there any other ideas or questions before we move forward? If not, take a few minutes and go to page 3 of your Participant’s Guide and write one best practice you are going to focus on in the next 30 days concerning onboarding. I will ask for a few commitments from the group once we are complete.</p> <div data-bbox="418 1415 1435 1583" style="background-color: #4a86e8; color: white; padding: 10px; border-radius: 10px;"> <p><b>INSTRUCTOR:</b> Give Participants 30 seconds to document their response and ask for 2-3 commitments, as time permits.</p> </div> <p><b>PP Slide #13:</b> Break</p>
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Break – 5 Minutes

## Unit 4 – Effective Communication in a Remote Environment

**Unit Objectives:** At the completion of this unit, Participants will:

- Discuss the different methods of communication available to a Supervisor in a remote work environment.
- Analyze the positive benefits of using each communication method, as well as the associated challenges.
- Start the process of creating a communication plan for their unit.

**Estimated Time:** 45 Minutes

### INSTRUCTOR:



**Say:** *At the heart of good management and supervision in a remote workforce is the need to be a great communicator. In this day and age, there are numerous methods of communication and so many think that communication is easy. This is simply not the case.*

*In this module we will explore the different methods of communication and explore the benefits and challenges of each. Before we do, let's explore a few best practices when it comes to communicating.*

### **Activity #1: Communication is the Key – Lecturette**

## INSTRUCTOR:



### PP Slide #14: Communication is the Key (PG Page 4)

#### Communication is the Key

- Make Every Communication Count.
- Choose Your Method of Communication Wisely.



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**Say:** Turn to page 4 in your Participant's Guide and fill in the blanks.

*It is important to remember the impact of what a Supervisor says is amplified in a remote environment. With remote workers, effective and frequent communication is critical. This cannot be emphasized enough. You must keep your workers informed about department information, events, and policies, as well as about your specific requirements and priorities.*

*It is also critical to develop mutual trust with your workers. You have to know they will perform their tasks professionally and effectively, and they have to trust that you will support them and be available for supervision and guidance.*

*Let's spend some time talking about communication.*

    	<p><i>Since your workers are not in the office and you cannot walk over to their desks to talk with them as issues arise, you must be purposeful about having clear and frequent communication. This may take extra effort on your part.</i></p> <p><i>You will often need to communicate by e-mail and phone. Since 80 percent of communication is nonverbal (conducted through body language, facial expressions, and so on), the more you know about your worker and the more clearly you communicate with your worker, the more effective your communication with that worker will be.</i></p> <p><i>To keep yourself and your Caseworkers informed, you will need to have excellent listening skills and learn to ask the right questions.</i></p> <p><b>Say:</b> <i>Remember, the importance of the communication between a supervisor and a remote Caseworker is amplified. This is because Managers and remote Caseworkers do not have as many opportunities for interaction as they would if the worker were in the office.</i></p> <p><i>Make every communication count.</i></p> <p><b>Ask:</b> <i>What do you think this means? (Wait for replies.)</i></p> <p><b>Say:</b> <i>If your calls and e-mails are purposeful, your worker will pay closer attention to them. Also, try to cover all that needs to be covered in one call or e-mail rather than inundating workers with hundreds of calls or e-mails.</i></p> <p><i>Your remote Caseworker may feel isolated since he or she is apart from coworkers in the office. You are the link to the unit.</i></p> <p><i>If a worker feels included, his or her motivation increases. This is one of the primary responsibilities of a Supervisor working with a remote team.</i></p>
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*There are several ways a Supervisor can make sure the unit is connected. One of them is working with everyone to determine the best method to communicate with them. To do this, let's explore the different types of communication available to your unit.*

### **Activity #2: Methods of Communication – Breakout Rooms**

**PRODUCER:** As the Instructor gives direction for the next exercise, prepare for the next breakout by dividing the Participants into random groups. If possible, break them into 6 groups, even if there are only two to a group. Otherwise, one group may need to cover more than one method.

**INSTRUCTOR:** Prepare Participants for the breakout. In the event there are less than 12 participants in the session, groups may have to take on more than one method.



**PP Slide #15:** Methods of Communication (PG Page 5)

## Methods of Communication



- Break into groups.
- You will be Assigned a Communication Method.
- 7 Minutes to Identify Pros and Cons
- Google is Your Friend.
- Person with the Newest Car Reports for the Group.

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**Say:** *We are going to divide you into random groups and assign each of you a method of communication.*

*You are tasked with giving the pros and cons of each method using the “T” chart in your participant’s guide.*

*You will be given 7 minutes to compile your list and 3 minutes to present it back to the class. Each group will only explore the pros and cons of their assigned method(s) of communication. After which, we’ll debrief all of them as a class.*

*The person with the newest car is to present your group’s findings back to the class. If that person has already presented in a previous activity, they can assign the task to someone else in the group.*

*Group #1 – What are the pros and cons of text messages?*

*Group #2 – What are the pros and cons of using e-mails?*

*Group #3 – What are the pros and cons of video conferencing (Zoom, Facetime, etc.)?*

*Group #4 – What are the pros and cons of using G Suite tools such as Google Chat?*



*Group #5 – What are the pros and cons of phone calls using work phones?*

*Group #6 – What are the pros and cons of face-to-face conferences?*

**Ask:** *Does anyone have any questions before we put you into your work group?*



**PRODUCER:** Break the class into groups and start a timer for 7 minutes. Cut and paste the instructions from above into the Chat for the teams to reference. At the 4-minute mark send a Chat to all groups that they have 3 minutes remaining. The Zoom system will give them a 60 second countdown before they return to class.



**INSTRUCTOR:** As the breakout groups return, welcome them back and ask for a team to volunteer to be the first to present. To ensure you can complete this unit timely, make sure to limit teach back to about 3 minutes. Encourage Participants as they teach the content back with statements like, “That’s great input.” or “Great insight, I had not thought of that.”



**INSTRUCTOR:** After each group has provided their presentation, make sure the following ideas are presented. If you decide to reinforce some of the content previously presented, make sure you give credit to the team for already discussing some of the content. For instance, if team 3 gave the idea of a virtual meet and greet for new staff, you might say “As Tommy stated when he presented his team’s ideas, a text can be a great way to transfer information. However, it just does not work well when communication gets emotional.”



**Say:** *Thanks everyone for your reports. I’d like to reinforce a couple of points before moving on.*

### Text Messaging

*Text messaging (texting) is useful for sending quick messages that contain little emotional content. It is appropriate for text messages to contain dates, times, data, or simple miscellaneous conversation. However, since the words are read but not heard, the standard cues that come with nonverbal communication are lost. When negative emotions are involved, improve communication by making face-to-face contact or using the telephone.*

*It is important to reinforce with your staff the dangers of texting while driving. Point out that while it might not be prohibited by policy (yet), it is dangerous and is certainly not condoned by our organization.*



### E-mailing

*E-mail is useful for communicating general information that contains little or no emotional content. Messages can be stored long-term for reference later, too. This often provides an important, historical record for Supervisors.*

*E-mail messages have the same limitations as text messages. However, staff may be overcome by the sheer volume of e-mail that they receive.*

*Ask Participants how they handle the amount of e-mail they receive. For example, using the Rules function in the Google e-mail system, unsubscribing to junk e-mail, using a spam filter, or limiting humorous e-mails from staff.*

### Video Conferencing

*Video conferencing using Facetime, Zoom, or Google Hangout is relatively new to the toolbelt of a Supervisor. Video conferencing allows the benefits of face-to-face meetings while limiting the costs associated with travel.*

*One of the terms that surfaced in 2020 is Zoom fatigue. This is often the results of too many zoom meetings held in a day or too many held back-to-back. Remember, while Zoom meetings can be very helpful, if a phone call will do, that might be a better choice. Also remember to add some time in between video conferences to take a break or step away from your desk.*

*Additionally, while video conferencing can add to the depth of your conversation, you will need to follow-up with an e-mail or a conference note in some cases to ensure everyone understands agreed upon actions or limitations. This is especially important when Supervisors are tracking performance issues. In those cases, video conferences, phone calls and face-to-face conversations should be followed up with some type of documentation.*

### G-Suite Tools such as Google Chat

*Now called Google Workspace. This product offers file storage and management as well as collaborative documents. People working on the same document can literally see the changes being made on their screen as others around the world are making changes. These tools are easy to use and reasonably priced. On the downside, Google Meet does not have the functionality of Zoom or GoToMeeting and the features in their spreadsheet need some beefing up.*

### Talking by Telephone

*A phone call adds voice tone and pitch, providing more communicative depth than the methods previously discussed. A phone call can quickly overcome physical distance and is useful for most conversations. Limitations include the lack of additional visual cues and body language.*

### Meeting Face-to-Face

*This is the richest form of communication. It allows verbal and nonverbal cues to be observed and ensures a better chance for accurate understanding. Limitations include travel costs in a remote environment and the possibility of receiving an emotional response to a critical issue. Face-to-face meetings require additional time to plan for potential emotional interactions.*

### Activity #3 – Creating a Communication Plan – Lecturette

## INSTRUCTOR:



### PP Slide #16: Methods of Communication, Plan (PG Page 8)

#### Communication is the Key

- Make Every Communication Count.
- Choose Your Method of Communication Wisely.
- Create a Communication Plan.



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### PP Slide #17: Let's Chat, Instructions (PG Page 8)

#### Let's Chat...

- I am going to read some questions.
- Place your answers in the chat box.
- Do Not hit the return/send button until instructed to do so.



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**Say:** *Because effective communication is essential to a remote unit, we have provided a worksheet in your Participant's Guide for you to complete with your staff. The worksheet provides an outline for communication with each individual in your unit and allows you to explore the expectations that your worker has of you, as well as the expectations that you have of your worker.*

*I am going to ask you a series of questions that you will need to consider, and I am going to ask you to provide brief answers in the Chat Box but do not hit "Enter" until I say "go." As we do this activity, I will point out some considerations.*

**INSTRUCTOR:** As you ask each of these questions, discuss the answers. The point of this exercise is to show that different Supervisors will have different expectations. If they are not clear in their expectations, their team members will not be either.



**PP Slide #18:** Let's Chat, Questions (3 Slides) (PG Page 8)

## Let's Chat...



- How often should a worker check email throughout the day?
- How long should e-mails be saved? Requirements?

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### PP Slide #19: Let's Chat, Questions (3 Slides) (PG Page 9)

#### Let's Chat...



- How often should voicemail be checked throughout the day?
- What is appropriate for text messages?
- How would you like to be notified of sick days?

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### PP Slide #20: Let's Chat, Questions (3 Slides) (PG Page 10-11)

#### Let's Chat...



- How often can your staff expect to see you face-to-face?
- Best time to reach you by phone?
- When do you pick up the phone?

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#### Ask:

- *How often should a worker check e-mail throughout the day?*
- *May a worker use text messaging to request sick leave?*



- *What should you or your worker do if emotions run high while you are communicating by text message or e-mail?*
- *How often, in a mobile environment, should you make face-to-face contact with your staff?*
- *Should your staff always be available by phone? If not, when should they be available?*
- *What are some considerations concerning confidentiality when using the phone to conduct a staffing consultation?*
- *What etiquette should be followed when communicating by e-mail, text messaging, and so on?*

**Say:** *By answering these questions together in advance, you will be able to create a plan that works for both you and your worker. Remember, as the Supervisor, you may have to adapt your style of communication to meet the needs of your staff. The type of communication you choose to use may be affected by the trust levels you have with your staff.*

*Finally, it is important to remember that some communication may be dictated by policy and best practice. For example, if you have a coaching session by phone concerning performance issues, the Supervisor will need to document that conference using the policies of their organization. They may need to follow up with an e-mail or conference note. We will be discussing corrective action more in the next Unit.*

**INSTRUCTOR:**

**PP Slide #21:** Break



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Break – 10 Minutes

## Unit 5 – Regularly Scheduled Meetings

**Unit Objectives:** Upon completion of this module, the Participant will:

- Understand the need for unit meetings.
- Create a draft agenda for their next unit meeting.
- Understand the need for one-on-one meetings with their staff.
- Create a draft agenda for their next one-on-one meeting with one of their staff.

**Estimated Time:** 30 Minutes

### INSTRUCTOR:



**Say:** *While we have explored the different methods of communication in a remote environment, we have yet to discuss scheduling those conversations. In this unit, we will explore how scheduling unit meetings and one-on-one meetings can ensure these objectives are met.*

### Activity #1: How Often Do You Meet? – Poll



**PP Slide #22:** Poll: How often do you currently meet with your team as a group, virtually or in-person? (PG Page 12)



## Let's Take a Poll...

How often do you currently meet with your team as a group, virtually or in-person?



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**PRODUCER:** Create a Poll asking the following question. When introduced, launch the following Poll and give everyone about 30 seconds to answer. The Instructor will provide a 15 second warning.

**Poll:** How often do you meet with your team as a group?

- Daily
- Weekly
- Every Other Week
- Monthly
- Other



### INSTRUCTOR:

**Say:** *We are going to discuss how improved communications with your team and the individuals on the team can lead to better performance, increased morale, and better outcomes for the team*

*and the organization.*

*To start, I am going to have our Producer launch a Poll to determine how often you conduct meetings with your team as a group. Do you conduct team meetings:*

- Daily
- Weekly
- Every Other Week
- Monthly
- Other



**INSTRUCTOR:** Debrief the Poll and clarify any “other” answers.

**Activity #2 –Team Meetings (Huddles) – Lecturette**

**INSTRUCTOR:**



**PP Slide #23:** Team Meeting/Huddle (PG Page 12)



**Say:** *One of the first things often sacrificed when a team begins to work remotely is the feeling of working as a team. If a group of people worked from the same office, it was likely they would meet each other throughout the week and spend some time together. This happened organically. However, when a team is working remotely, this type of team interaction requires conscious effort and planning. Often, a team huddle is what is needed.*

*Scheduled team huddles or meeting allows the team to connect with one another and with you as their Supervisor. In an office, team members may spend some time each day talking and sharing what is going on in their lives. Weekend activities, what their children are doing at school, and how their husband is driving them crazy are all topics of conversation used to build and strengthen relationships.*

*A scheduled huddle or meeting allows the Supervisor an opportunity to share information concerning the organization or the unit, all at the same time. This reduces the time you might have to spend sharing this information during other calls for the week.*

*A scheduled huddle or meeting also allows the Supervisor to celebrate accomplishments as a team. Celebrating anniversaries, individual and team accomplishment, and birthdays helps to build the team which is one of your primary responsibilities as a Supervisor leading a remote unit.*

*Holding a scheduled meeting or huddle can be done several ways, such as GoToMeeting, Zoom Meeting, or a simple conference call. A best practice is to have a consistent means of hosting the huddle and a standard agenda.*



**PP Slide #24:** Team Meeting/Huddle, Standard Agenda (PG Page 12)



**PP Slide #25:** Team Meeting/Huddle, Agenda - General (PG Page 12)



- *Start with general communications and visiting. Introduce new staff if applicable, provide key communications and provide a few minutes for everyone on the team to “check in” on what is going on in their lives. Share good news and accomplishments during this time.*
  - *If you want to do so, you can provide some time for a mixer activity during this timeframe. Sharing personal information can help maintain teamwork and connectivity.*

**PP Slide #26:** Team Meeting/Huddle, Agenda - Assignments (PG Page 12)



## Team Huddle Agenda

### Assignments

- Caseload
- Special Assignments

- *Afterwards, make assignments and check on progress of previous assignments.*
  - *Assignments could be things like caseload assignments, additional duties being assigned to team members, or organizational areas of focus. Do you need to get your “case pending” rate down? Add that to this section of the agenda.*

**PP Slide #27:** Team Meeting/Huddle, Agenda - Training (PG Page 12)





## Team Huddle Agenda

### Training

- Policy
- Best Practice
- Case Reviews

- *Finally, consider adding some training to the meeting.*
  - *Delegate someone to provide a best practice, review a policy that is new or being overlooked, or share a shortcut they have learned that might save team member's some time.*

*We recommend scheduling this meeting/huddle consistently. Mondays allow you to recover from the weekend as a team and transfer assignments received while on call. Having it at the same time makes it easier for the entire unit to schedule.*

*Finally, try and have some fun. Recently we have had “wear your cowboy hat to work day” and “wear a team sport shirt day” and “bring your pet to work day.” Since many of us are starting our days from home, this is easy to do and helps to improve team spirit.*

**PP Slide #28:** Team Meeting/Huddle, Agenda (PG Page12)

## Team Huddle Agenda – You Practice



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*Having a consistent meeting or huddle improves morale, allows you to disseminate information concerning the team and the organization effectively, and can help the team stay in touch when they would otherwise not see each other for weeks on end.*

*One of the agenda items we discussed earlier is assignments and expectations. It is important that Supervisors use the huddle as an opportunity to refocus on goals and measure progress as a team. Team scoreboards shared during the huddle is one way to do that.*

### **Activity #3 – One-on-One Meetings – Chat**



**PP Slide #29:** One-on-Ones (PG Page 13)



## One-on-Ones

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### INSTRUCTOR:



**Say:** *In addition to the regularly scheduled team meeting (huddle) where you can share information with the whole group, a Supervisor should also schedule a one-on-one meeting with each of their staff. These should be scheduled as required by policy but can also be scheduled more often as needed for performance issues and the tenor of your staff. New staff may need to have additional meetings scheduled due to the fact that you are providing closer supervision than might be required for tenured workers. Workers with high caseloads may also require additional meetings to ensure client safety, case progression and attention to critical issues in the case.*

*Let's start by exploring why a one-on-one is so important, and then I'll share how to effectively plan and conduct these important meetings.*



**PP Slide #30:** Let's Chat (PG Page 13)

## Let's Chat...



Place your answer to the following question in the chat box.

*Why is it important to spend one-on-one time with your staff outside of the team meetings?*

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**Ask:** *Will everyone please use the Chat Box to write a few words as to why it is important to meet with your staff individually outside of the team huddle?*



**INSTRUCTOR:** Debrief the content of the Chat Box by reading comments and expanding on them. You may also want to have some unmute themselves and expand on their comments.

**INSTRUCTOR:** If not already mentioned, add the following content to the discussion:



**Say:** *As we stated before, one of the first things you will find in a mobile environment is that people lose touch with each other quickly. The reality is, most APS workers have always been remote workers to some degree. They are required to be in the field either interviewing clients, completing investigations or providing*

*services. However, your organization may have required your staff to start each day from an office. This would have been the time where they created relationships with others and had some social interaction. However, in a fully remote environment, this is no longer a requirement and, as a result, the members of your team may lose touch with each other and the organization. The one-on-one with individual team members is a time where you check in with your team member allowing you to maintain your relationship, check up on their needs regarding their job, review progress on goals and commitments, and provide them with information they would otherwise miss out on by not being in the office.*

*Now that we know the “why,” let’s take a few moments to explore the “how.”*



**PP Slide #31: One-on-Ones, Regularly Scheduled... (PG Page 13)**

**One-on-Ones**

- Regularly Scheduled
- Team Member Focused
- Agenda, Be Prepared

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*First, like huddles, one-on-one meetings need to be regularly scheduled. A good place to start is 30 minutes a minimum of one time a week.*

*Once they have been scheduled you should work diligently not to miss them. If you do have to miss one, reschedule it for later in the week. Remember, when you must cancel a one-on-one, what you are telling your staff is that whatever you're cancelling your one-on-one for is more important than they are. So, do your best to make these scheduled appointments each week. This may mean that you need to originally schedule most of your one-on-one meetings early in the week so you have the flexibility to schedule them later in the week, if necessary.*

*Also, remember that the primary focus is on your team member. While you will be talking about organizational requirements and demands, the goal is to keep team members in tune with the organization and the unit so they can be successful in serving our clients.*

*It is also important that you take notes so that you can follow-up with any assignments or performance issues. One of my favorite sayings is "You don't get what you expect, you get what you inspect." Discussing case related issues and performance goals each meeting, and then documenting them in a conference note, lets your staff know that you will be following up on assignments and expectations.*

*So where will we be holding these one-on-one meetings? For now, in our current situation, we will likely be holding these meetings over the phone or with a video conference or maybe FaceTime. Later, supervisors can determine the location of these meetings.*

*It is important to be prepared. A few minutes before a one-on-one, start looking over your notes from your last meeting and review any commitments or assignments that will need to be followed up on. Make sure your technology is working if you are using GoToMeeting, Zoom, or Facetime.*



**PP Slide #32: One-on-Ones, What's going on... (PG Page 13)**

**One-on-Ones**

Possible Agenda

- What's Going on With Them?
- What's Going on With the Agency?
- Staff Development/ Performance

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*Like the huddle, the one-on-one can also be broken into 10 minutes increments. This means you will be spending about 10 minutes talking about them. How are they doing personally? What challenges have they faced in their caseload? How can you be of help in their work? Then, you're going spend about 10 minutes discussing what is going on in the agency. Are there any special assignments they will be getting? Are there any legislative changes they need to be made aware of and are there any organizational rumors that need to be clarified? Finally, the last 10 minutes is an opportunity to help staff grow. Is there anything that you can share to help them do their job more efficiently? What training tidbit can you provide? Do you need to review progress in their development? What do they need to know to be successful in the coming weeks?*

*As you can tell, it will take time to prepare for each one-on-one by reviewing previous notes, gathering information that you might need to share, and preparing for a few minutes of training.*

*It is important to remember that your team members are not as*

*connected with the agency in a mobile environment. So, share the organization's information and dispel any rumors to help them stay in the know.*

*Providing the feedback and encouragement on what they are doing well or have accomplished also helps reinforce their commitment to the team, the organization, and to you as their Supervisor. Consider always wrapping up each one-on-one with a word of appreciation and encouragement.*

*The one-on-one meeting is also the time where you and your direct report can review progress on performance issues. Let's take a look at performance issues now.*



### **PP Slide #33: Break**



**Break – 7 Minutes**



## Unit 6 - Performance Issues in a Remote Environment

**Unit Objectives:** Upon completion of this unit, Participants will be able to:

- Identify the five contributing factors to poor performance.
- Understand how to overcome these factors through unit one-on-one meetings.
- Identify the general considerations for coaching and Individual Performance Plans (IPP).

**Estimated Time:** 40 Minutes

### Activity #1: What's the Problem? – Lecturette

**INSTRUCTOR:**

**PP Slide #34:** Performance Issues (PG Page 14)

### **Performance Issues**

*Let's Review – Keys to Effective Supervision*

- Clearly Defined Goals
- Aligning Resources and Strengths
- Establishing Trust
- Monitoring and Feedback
- Celebrating Accomplishments
- Developing Staff





**Say:** *One of the challenges in a remote workforce is monitoring performance and correcting poor performance. If you remember from an earlier unit in this training, we stated that the Supervisor will need to:*

- *Define goals and expected outcomes clearly.*
- *Align resources/employees so the unit's strength is brought to bear, on specific tasks.*
- *Monitor progress and provide feedback during the process.*
- *Celebrate accomplishments throughout the process until goals are achieved.*
- *Develop staff today so they are equipped to meet the goals of tomorrow.*

*In this unit we are going to learn the five main contributing factors for poor performance as well as how to address them during one-one-one meetings. Finally, we will discuss considerations for coaching and individual performance plans.*



*Turn to page 13 in your Participant Guide and fill in the blanks as I share the five primary factors that contribute to poor performance.*



**PP Slide #35:** What's the Problem? (PG Page 14)



## What's the Problem?

### Performance Issues

Lack of Knowledge

Lack of Skill

Lack of Motivation

Personal Issues

Environmental Issues

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**Say:** *Regardless of whether you are in a remote environment, performance issues generally result from one or more of the five issues listed on the displayed slide.*



### PP Slide #36: Lack of Knowledge (PG Page 14)



## Lack of Knowledge

- Clear Expectations?
- Knowledge of Measurement
- Feedback Provided
- Feedback Understandable

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**Say:** *If a worker lacks the knowledge to perform the job well, it is the Supervisor's responsibility to supply the missing information or to provide training for the worker. Ask yourself these questions to help clarify the issue:*

- *Have expectations been clearly communicated?*
- *Have I provided the worker with how those expectations will be measured?*
- *Have I provided the worker with accurate, timely, and specific feedback on his or her performance?*
- *Was the feedback constructive and easy to understand?*
- *Did I check the worker's understanding of the feedback?*
- *Does the worker know how to obtain feedback on his or her performance independently?*




**PP Slide #37:** Lack of Skills (PG Page 14)



## Lack of Skill

- Do They Understand the Importance of Performance?
- Did They Ever Have the Skill?
- Would a Job Aid Help?

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**Say:** *When a worker lacks the skills to perform the job, it is up to the Supervisor to ensure the worker has the opportunity to develop*

*the necessary skills. It is also the Supervisor's responsibility to determine whether the worker is unable to obtain the necessary skills to perform the job.*

*Ask yourself the following questions to help clarify the issue*

- *Does the worker understand why the desired performance is important?*
- *Did the worker ever have the skills needed to perform the required tasks?*
- *Would a job aid be of assistance in improving the worker's skills?*



**PP Slide #38: Lack of Motivation (PG Page 14)**



**Say:** *Both the Supervisor and the worker are responsible for the worker's motivation. The Supervisor needs to determine the origin of any poor attitudes held by the worker.*

*Ask yourself these questions to help clarify the issue*

- *Are there rewards I can offer for good performance?*
- *Are there consequences I can impose for poor performance?*



- *Is the worker confident in his or her ability to perform?*
- *Does the worker feel valued by me, the region, and the department?*

**PP Slide #39: Personal Issues (PG Page 14)**



**Personal Issues**

- Handled by the Worker
- Employee Assistance
- Be Aware of Your Role
- Make a Referral

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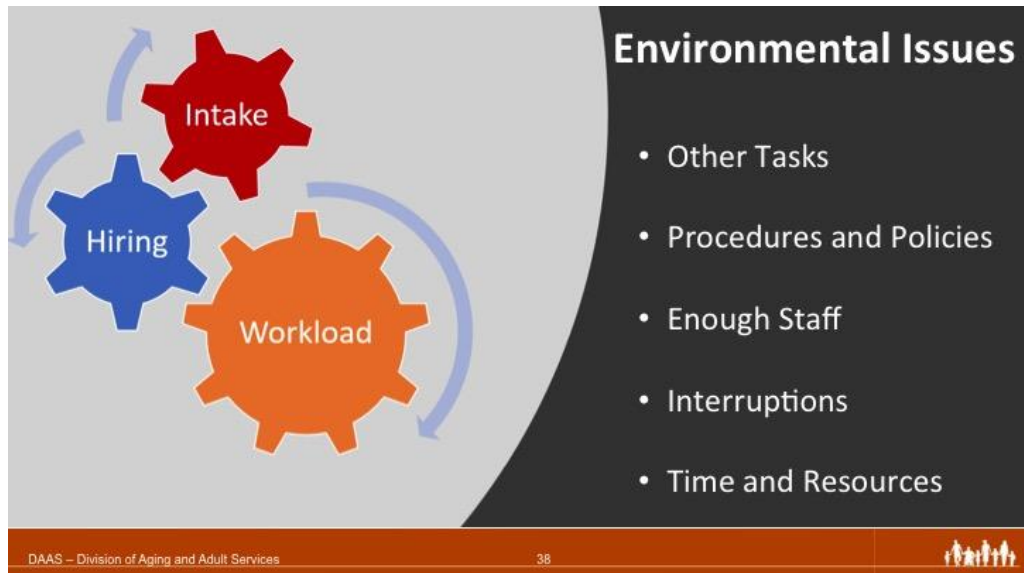
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**Say:** *Personal issues need to be resolved by the worker. However, a Supervisor may be able help the worker identify the problem and can offer resources to the worker, such as an Employee Assistance Program (EAP). It is important to remember that while a Supervisor can be a listening ear and provide emotional support, a supervisor should not act as a counselor or therapist and should refer people to a professional when the issue becomes substantial enough to warrant it. Most times, professional support should be offered when personal issues are effecting performance.*



**PP Slide #40: Environmental Issues (PG Page 15)**



**Say:** *If job performance is hampered by the work environment (for example, if the worker is held to unrealistic standards or is provided with inadequate equipment), it is the Supervisor's responsibility to address these issues and to possibly involve upper management for resolution.*

*Ask yourself these questions to help clarify the issue:*

- *Did other tasks interfere with the worker's ability to complete the tasks that were not performed well?*
- *Are procedures and policies related to the performance logical and reasonable? Are they understandable?*
- *Are there enough staff members to perform the task adequately?*
- *Is the performance of the worker frequently interrupted?*
- *Is there enough time to accomplish the assigned task?*



**PP Slide #41:** What's the Problem? (PG Page 15)



## What's the Problem?



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**Say:** *Most, if not all performance issues, are the result of one or a combination of more than one of these factors. Accurately identifying the root problem of the performance issues is key to accurately addressing the issue. Let's spend a little time on application.*

### Activity #2: Case Study – Breakout Rooms

**PRODUCER:** As the Instructor gives directions, prepare to break Participants into Breakout Rooms of 3-4 people. Groups can be randomly generated.



## INSTRUCTOR:

PP Slide #42: Case Study (PG Page 15)

### Create a Case Study



- Breakout into Groups.
- Someone Share a Performance Issue.
- Determine Factor(s) that Effected Performance.
- 7 Minutes to Discuss
- 1-2 Groups will Share Upon Return

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**Say:** *We are going to break the class into 5 groups. While in your group ask for a volunteer to share an example of a performance issue one of their staff is experiencing. Give a brief overview and then, as a group, determine which of the factors mentioned above were part of the issue. You will not have time to discuss numerous issues so if someone has one they are currently facing use that as an example. Once you have shared the issue, determine which of the factors we have discussed are part of the issue. When we return, we will have one or two of the breakout groups share the issue as well as their determination of the root cause.*



**INSTRUCTOR:** Give Participants 7 minutes to identify one problem they have experienced concerning performance in their unit.



**PRODUCER:** Break the class into groups and start a timer for 7 minutes. Cut and paste the instructions from above into Chat for the teams to reference. At the 4-minute mark, send a Chat to all groups that they have 3 minutes remaining. Zoom will give them a 60 second countdown before they return to class.



**INSTRUCTOR:** As the breakout groups return, welcome them back and ask for a team to volunteer to present. As they present, ensure they communicate the core issue of the performance problem as well as possible solutions. This may require the Instructor to probe and clarify.



**Ask:**

- *How did you determine the issue?*
- *Which of the above-mentioned factors were at the root of the issue?*
- *How can you resolve the issue?*
- *What resources can you use to resolve or deal with the issue?*

### **Activity #3 – Coaching to Correction – Lecturette**

**INSTRUCTOR:**





### PP Slide #43: Coaching and Correcting (PG Page 16)



## Coaching and Correcting



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**Say:** *Managing performance issues requires not only identifying the root cause, but creating a plan, establishing milestones, and documenting progress. One question that is often asked is “When do I move from coaching and conference notes to a Personal Improvement Plan (PIP) to corrective action?” Many organizations have specific milestones, but a few general rules of thumb include:*



### PP Slide #44: Coaching/Correction (PG Page 16)

## Coaching/Correction

- Coach Early and Often.
- Provide Feedback Early.
- Reassess.
- Reach Out to DAAS HR.



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*Coach Early and Often* – When a problem first surfaces, ensure you use the next one-on-one to discuss the issue and redirect your staff. This ensures minor issues are caught early and addressed before they become habits or trends. If you do not address issues quickly, staff may not even know there is an issue. Poor performance that is not discussed is often considered as “condoned.”

*Provide Feedback Early* – Before poor performance becomes habitual, provide feedback. A formal document is not always necessary for coaching but agreed upon actions should be followed up with a written e-mail for reference. Remember, if the issue is a lack of knowledge or skill, training may be called for.

*When Coaching Doesn't Work* – If coaching does not work, spend additional time looking for the root cause of the performance issue. If it relates to a lack of motivation or personal issues, and coaching has not worked, contact your agency's HR for additional guidance. Documenting your performance or behavior

*conversations identifying the performance and expectation gaps in an e-mail or a "Personnel Management Note"; this will allow you to clearly communicate expectations to staff and start the process of documenting issues. Include what the issue is, why it is a problem for the unit or the organization, agreed upon actions and timeframes, and the consequences of not following through on the plan. It is always beneficial to have your Supervisor/Manager review the document before providing it to your staff. This document should be signed by both the staff member and the Supervisor and maintained in the staff member's personnel folder. If a "wet" signature is not an option, e-mail or a MAP note will suffice.*

*Dealing with performance issues is important whether you are working in a remote environment. However, keeping track of performance issues when you do not see each other consistently can be more of a challenge. Having a plan in place to document and follow-up with performance issues makes it easier to ensure they are addressed.*

## Unit 7 – Wrapping Up and Commitment

**Unit Objectives:** Upon completion of this unit, Participants will share one or two actions they will take in the next 30 days to better themselves at supervising a remote unit.

**Estimated Time:** 5 Minutes

### Activity #1: What Will I Do? – Chat

**INSTRUCTOR:**

**PP Slide #45:** Let's Chat (PG Page 17)

#### Let's Chat...

In the next 30 days,

- What commitment you will make to implement?
- What will you do to improve onboarding, communication, and/or performance management?

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**Say:** *In the past four hours, we have covered a lot of information. To wrap up we are going to have you think about what you have learned in our time together and type a commitment you will make*



*to implement in the next 30 days in the Chat Box. In the Chat Box, type a sentence or two about what you will do in the next 30 days to improve onboarding, communication, and/or performance management, based on what you have learned today. We will give you a few minutes to type.*

**INSTRUCTOR & PRODUCER:** Give the Participants 1-2 minutes to type. As Participants provide their commitment, read them out to the rest of the Participants. This will provide a review as well as offer closure to the session.



**INSTRUCTOR:**

**Say:** *Thank you for spending your time with us today. While we have invested four hours in learning best practices for supervising a remote workforce, we still have one more thing we will be doing before we are done with this course. Yes, you have homework.*

## Unit 8 – Homework

**Unit Objective:** Upon completion of this unit, Participants will:

- Read a brief paper on team building in a remote environment.
- Attend a 1-hour “Booster” activity in the next 60 days to share outcomes from their commitment in Unit 7 as well as one thing they did to build the team from the ideas shared.

**Estimated Time:** 5 Minutes

### INSTRUCTOR:

**PP Slide #46:** What’s Next? (PG Page 17)

**What’s  
Next?**



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**Say:** *In the future we will be scheduling a follow-up session where groups of 10-12 of you will attend a 1-hour webinar where you will discuss how your commitments went. In addition, we will be asking you to read a short document concerning ideas for team*



*building in a remote environment. In that document, you will see a variety of ideas on how to build and maintain a remote team. Your assignment is to choose one of those ideas and try it. When you meet with your follow-up group, you will be asked to share what you tried, how it went, and what you learned.*

#### **PP Slide #47: Questions**

### **Questions**



## BOOSTER ACTIVITY – Lunch and Learn

**Unit Objective:** This “booster” activity is developed to be used 30-60 days after the completion of “Supervising a Remote Workforce” virtual training. It is designed to

- provide participants with ideas for Team Building in a remote workforce,
- encourage them to try these ideas, and
- share results in a 1-hour online meeting.

**Estimated Time:** 1.5 hours

- Welcome and Orientation – 10 Minutes
- Workshop Review – 20 Minutes
- The Importance of Team Building and Maintenance in a Remote Environment – 15 Minutes
- Breakout – Best Practices – 40 Minutes
- Wrap-Up – 5 Minutes

**INSTRUCTOR & PRODUCER:** Preparation and Setup

Actions to complete prior to beginning of class:

- Create Zoom link for the session and send it to all participants both as an email and a calendar appointment, when possible. In both communications, provide a number where the Facilitator and/or Producer can be reached by text in the event of technical problems. Remind them to have their participant’s guide from the workshop available. In all communications, remind them to have a printed copy



of the Facilitator and/or Producer's phone number and their Participant's Guide to use during the session. Example e-mail:

*Greetings,*

*Thank you for attending the Supervising a Remote Workforce workshop last month. We hope that you came away from the experience with some new ideas on how to better manage staff remotely through improved relationships, better communications, and insight on how to identify and address performance issues.*

*If you remember, when we closed the workshop, we promised a follow-up "booster" activity. That booster activity is currently scheduled for \_\_\_\_\_, \_\_\_\_.*

*Attached, please find two small e-books/handouts with ideas for team building in a remote environment. Additionally, you can find some Quarantine Bingo Cards for use as a mixer periodically during your online meetings. These were used early on during the pandemic, but they will give you some examples you may be able to adapt. All of these resources add some fun and a spirit of teamwork while working from a remote environment.*

*During our booster activity on \_\_\_\_\_, \_\_\_\_\_, we will be asking you to share ideas you have tried regarding maintaining a spirit of camaraderie while working from a remote environment. Try some of the attached ideas or do your own research on the internet and come prepared to share your ideas and success stories.*

*We look forward to seeing you soon.*

*Signature Bloc of the Trainer*

	<ul style="list-style-type: none"><li>• Send an e-mail reminder the morning of as well as 1-hour prior to the session. Encourage people to log in 15 minutes early, especially if they are uncomfortable with technology.</li><li>• Launch ZOOM Meeting and PowerPoint 30 minutes prior to the session. Prepare to welcome guests and troubleshoot technical issues as people arrive.</li><li>• As people arrive, ensure their name is displayed. You may also choose to have them update their name with their location. Example: "Michael Curtis, Tyler Texas"</li></ul>
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## BOOSTER Unit 1 – Welcome and Orientation

**Unit Objective:** Upon completion of this unit, Participants will:

- Review Content from Supervising a Remote Workforce
- Report on Activities that Have Been Successful
- Share Ideas on Team Building
- Create a 60 Day Plan to Try New Team Building Ideas

**Estimated Time:** 10 Minutes

**PRODUCER:** Prepare to break Participants into Breakout Rooms of 3-4 people for the first activity. Groups can be randomly generated.

**INSTRUCTOR:**

**PP Slide #48:** Welcome Back



Welcome Back

In the chat box, write out one thing you are looking forward to doing when we get through COVID:

- A Place You Want to Go
- A Person You Want to See
- An Adventure You Want to Explore
- Other

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**Say:** *Welcome to our booster activity for Managing a Remote Environment. As we log on for the booster, use the chat feature of zoom to identify a place you want to go, a person you want to see or an adventure you want to take.*

*Facilitate the chat box entries and have people expand on their answers as people log-in for the booster. When everyone is logged in and it is time to begin the booster...*

*If you remember, at the end of the training in \_\_\_\_\_, you committed to try one thing to improve onboarding, communication and/or performance management in a remote environment. We also discussed that we would be coming back to check in on progress and explore team building in a remote workforce as well.*



#### **PP Slide #49: Goals of the Booster**

### Welcome Back

#### Goals of the Booster

- Review Content from Managing a Remote Workforce
- Report on Activities that Have Been Successful
- Share Ideas on Team Building
- Create a 60 Day Plan to Try New Team Building Ideas



**Say:** *Our goals for today include:*

- *Review Content from Managing a Remote Workforce*
- *Report on Activities that Have Been Successful*
- *Share Ideas on Team Building*

	<ul style="list-style-type: none"><li>• <i>Create a 60 Day Plan to Try New Team Building Ideas</i></li></ul> <p>Like the last time, we are using Zoom. I expect many of you are familiar with the Zoom interface by now but let us spend a few moments reminding ourselves how to use the interactive tools.</p> <p>Cover breakout rooms, chat box and reactions. No other tools will be used for this booster.</p>
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## BOOSTER Unit 2 – Review of the Workshop

**Unit Objective:** Upon completion of this unit, Participants will:

- Review What Onboarding, Communication, and/or Performance Tools Were Tried since the Workshop
- Discuss the Results of those Experiments

**Estimated Time:** 20 Minutes

**PRODUCER:** Prepare to break Participants into Breakout Rooms of 3-4 people for the next activity. Groups can be randomly generated. Try and group them so they are not with the same people they were with previously.

**INSTRUCTOR:**



### PP Slide #50: Lesson's Learned

#### Lesson's Learned

##### Experiments in Supervising a Remote Workforce

- What Did You Choose from the Training to Try with Your Team?
- Did You Try any Other Ideas?
- 8 Minutes for Discussions
- Groups will Report Back (Choose a Leader)





**Say:** *If you remember, at the end of the training in \_\_\_\_\_, you committed to try one thing to improve onboarding, communication and performance management in a remote environment.*

*We discussed communication methods, creating a communication plan for your unit, how to identify performance issues and some ideas on how to address them.*

*Let's take a few moments to discuss how your experiments went in using some of these ideas. Additionally, if you have been successful with other tools in leading a remote workforce, take a few moments to share those too.*

*We will be giving you about 8 minutes to share in small groups using breakout rooms and will ask that each group identify a "reporter" to share one success story from the group.*



**Ask:** Does anyone have any questions or comments before we send everyone to their breakout rooms? Just a friendly reminder, you will have to accept the invitation to join the room.



**PRODUCER:** Cut and paste instructions into the chat feature prior to launching the breakout rooms. Launch the Breakout Rooms when everyone appears ready.



Set a timer for 8 minutes and let the rooms know when they have 4 minutes remaining and again when they have 2 minutes remaining. Close the rooms when there is one minute remaining and Zoom will give them a 60 second countdown before they return to class.

	<p><b>INSTRUCTOR:</b> When everyone returns, have the spokesperson from 2-3 of the groups report back their success story. Emphasize and add any comments you feel are necessary to reinforce points made during the presentations.</p>
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## BOOSTER Unit 3 – The Importance of Team Building

**Unit Objective:** Upon completion of this unit, Participants will:

- Understand Why Team Building is Important
- Share Ideas for Building and Maintaining the Team in a Remote Environment.

**Estimated Time:** 15 Minutes

**PRODUCER:** Prepare to break Participants into Breakout Rooms of 3-4 people for the next activity. Groups can be randomly generated. Try and group them so they are not with the same people they were with previously.

### INSTRUCTOR:

**PP Slide #51:** Why is Team Building Important?

Why is Team Building Important?

- Builds Trust and Improves Communication
- Maximize Team Experience
- Helps with Stress and Emotional Trauma
- Helps Manage Resources More Effectively





**Say:** *While we did not have time to take up the topic of team building in the original training, it is a huge issue in a remote workforce. A study of 1,100 employees by VitalSmarts found that employees working remotely often felt their priorities were not supported, felt colleagues made changes to projects without consulting them, and colleagues spoke negatively about them and actively lobbied against them in the workplace in their absence.*

<https://hbr.org/2017/11/a-study-of-1100-employees-found-that-remote-workers-feel-shunned-and-left-out#>

*Prior to COVID-19, the American Psychological Association was already researching the effects of remote working on team camaraderie. What they found was that “Trust among team members starts lower in virtual teams than in face-to-face teams, but over time, it can be built to the same levels.” Other research has found that identifying a team’s goals, mission, roles and communication methods also has a positive impact on team building (Gibson, C.B., et al, Journal of International Business Studies, Vol. 50, No. 6, 2019). In short, what the research seems to indicate is that team building is influenced by:*

- *Strong Group Identity – How a team views their belonging to a group of people with similar values or a similar mission or purpose and...*
- *Group Disclosure – How much team members know about each other personally and professionally.*

*While team building may seem like a lot of “Fun and Games,” these activities are fun with a purpose. Team members that are emotionally connected to each other can provide support to each other in numerous ways.*

*First, feeling connected to others on the team allows for team members to work together to staff cases and solve case-related problems. Matching a tenured worker to a new worker in a pseudo-mentoring relationship can provide the junior worker the*

*opportunity to ask questions and problem solve in ways they might not do with their supervisor. People may not want to ask what they feel are “stupid questions” to their supervisor but may feel better about doing so with a co-worker. Setting up an informal supportive relationship like this can be very helpful with new workers learning the skills and knowledge needed to do the job.*

*Second, having someone to “vent” to can be helpful in dealing with the emotional trauma workers are often exposed to. Not only is it helpful to talk about some of the issues we face as Adult Protective Services Specialists, but the person who is listening can help identify when additional resources are needed to deal with secondary trauma. However, people will seldom talk about their personal struggles with people they do not know on some level.*

*Finally, ensuring team members remain connected in a remote workforce can have some practical, “bottom line” benefits. In many cases, different workers may have clients in close proximity to each other. Having workers coordinate visits by location can save time and travel dollars.*

**Transition:** *Let us take a few moments to explore how we can practically work towards building the team in a remote environment.*

## BOOSTER Unit 4 – Best Practices in Team

**Unit Objective:** Upon completion of this unit, Participants will:

- Collaborate on Best Practices in Team Building for a Remote Workforce
- Share Activities that Have Been Successful

**Estimated Time:** 40 Minutes

**INSTRUCTOR:**

**PP Slide #52:** Best Practices in Teambuilding

### Best Practices in Teambuilding

- Break Into Groups of 3-4 People
- 15 Minutes to Compile your Presentation
- In Regard to Team Building:
  - What Have You Tried with Success
  - What Have We Learned From Our Attempts
  - What Else Can We Try



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**Say:** *Prior to this booster activity you were provided some resources on team building. These included activities to use during your virtual team meetings to help team members connect to each other both professionally and personally.*

*You will be assigned a breakout room with 3-4 other people and*



*given 15 minutes to create a presentation concerning best practices in Team Building in a Remote Environment. If you tried any of the ideas sent prior to this booster you may choose to report on their results. You may also choose to do some research and present additional ideas to try. The choice is yours.*

*You will be given 15 minutes to work together to create a 3–5-minute presentation on best practices in team building. Answer these questions:*

- *What have we tried regarding team building that has been successful?*
- *What ideas have not been successful and what did we learn from the attempt?*
- *What ideas did we discover through a quick Google search and which will we try in the next 30 days?*

**Ask:** *Does anyone have any questions or comments before we send everyone to their breakout rooms?*

**PRODUCER:** Cut and paste instructions into the chat feature prior to launching the breakout rooms. Launch the Breakout Rooms when everyone appears ready.

Set a timer for 15 minutes and let the rooms know when they have 10 minutes remaining, when they have 5 minutes remaining, and again when they have 2 minutes remaining. Zoom will give them a 60 second countdown before they

**INSTRUCTOR:** When everyone has returned,



**Ask:** *Do we have a volunteer to go first? Allow them to present their findings. Encourage good ideas and reinforce any key concepts provided as they present to the larger group.*

**Say:** *If not covered by participants, point out the VitalSmarts Survey also asked about supervisory/management best practices that led them to have better working relationships and lower negative effects.*

- *Frequent Check-Ins – While the cadence of these check-ins varied, they were consistent and usually included a standing meeting or huddle.*
- *Face-to-Face Contact – Either in-person or by video, successful supervisors and managers ensured they had some “face-time” with their constituents.*
- *Excellent Communication Skills – Respondents reported that the successful manager/supervisor had excellent communication skills. Specifically, they were good listeners and communicated trust and respect. If they erred in estimating the amount of communication needed, they erred on the side of more instead of less communication. As a group, they modeled treating each other with dignity and respect.*
- *Prioritized Relationships – Having conversations about personal issues such as hobbies, families and personal life added strength to relationships which is at the core of building a team.*

*The research indicated that lack of close contact with people undermines trust resulting in the undermining of team dynamics. However, supervisors who practice good team building skills can increase the potential for improved team dynamics.*

## BOOSTER Unit 5 – Wrap Up and Action Planning

**Unit Objective:** Upon completion of this unit, Participants will:

- Review Best Practices in Team Building for a Remote Workforce
- Choose 1-2 Ideas to Try in the Next 30-60 Days

**Estimated Time:** 5 Minutes

**INSTRUCTOR:**

**PP Slide #53:** Best Practices in Teambuilding

### Action Planning




Today you have shared several ideas concerning how to build and maintain your team. Choose one new idea you will commit to trying in the next 30-60 days and type it into the chat.

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**Say:** *Good leaders are always learning and looking for ways to strengthen the team. Today we spent some time talking about team building and how important it is for a remote workforce. Take a moment and think about the ideas we shared in the pre-reading and in the booster activity today. Choose one or two ideas*

	<p><i>you would like to try in the next 30 – 60 days and type something you will commit to in the chat.</i></p>
	<p><b>INSTRUCTOR:</b> Give participants 30-60 seconds to type something in the chat box.</p>
	<p><b>PRODUCER:</b> As participants type ideas, read them to the group.</p>
	<p><b>INSTRUCTOR:</b></p> <p><b>Say something like:</b> <i>Thank you for your attendance today. Remember that as vaccines are provided, many organizations may return to an office environment. Many, however, will see the benefits of working in a remote environment if units are led well by a supervisor who understands the challenges and the solutions of doing so. By continuing to research how to be more effective in a remote environment, supervisors set themselves up to be the leader of successful teams.</i></p>

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