EAB

Ensuring Accountability and Support for Remote Teams

Suggestions for Working Together in a Post-COVID World

Navigate

Housekeeping slides

And ask for up to date slide 3

Resources to Follow

Navigate Release Notes in the Help Center -

- 19.2.6.1 Release – Clickable URL/Phone Number
- 19.2.7 Release - Bulk release (mass alerts, text message opt out reports, time zones, scheduling over courses)
- 19.2.8 Release –Further improvements to the new "Allow Students to Schedule Over Courses" option and the ability to mass issue Alerts
- 19.2.9 Release – Clickable URL/Phone field can be used in Smart Guidance appointment scheduling

COVID-19 Resources and Navigate Recommendations in the Help Center -

- COVID-19 Navigate Resource Center
- Providing Virtual Support to Students and Staff During Crisis

= specific to Navigate or Platform functionality

Upcoming Webinars

Managing a Student Success Team in a Virtual Environment

Tuesday, April 21
1:00-2:00pm EDT

Developing Coping and Resilience Skills to Advance Student Success

Tuesday, May 4
2:00-3:00pm EDT

Building a Summer Strategy to Promote Persistence and Degree Progress

Tuesday, May 5
1:00-2:00pm EDT

Meeting Students' Financial Needs in a COVID-Prompted Recession

Tuesday, June 16
1:00-2:00 EDT

Past Webinars

Introducing Navigate Enhancements to Help You Virtually Support Your Students

Wednesday, March 25
3:00-4:00pm EDT

Best Practices for Serving Students Remotely

Thursday, March 26
1:00-2:00pm EDT

Preparing Now for Student Success Post-Pandemic

Monday, March 30
3:00-4:00pm EDT

Registration links and recordings to watch past webinars will be sent in follow up

1 What to do first: Set expectations

2 Effective meeting management

3 One-on-one check-ins

4 Communication

5 Driving accountability

6 Managing unique personal circumstances

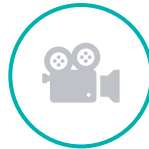**7** Additional resources

Set Clear Expectations with your Team

In a virtual environment, this is the first step to take

Set up time with your team to discuss the following:

Review management expectations

- Discuss how you intend to uphold manager-managee expectations in a virtual environment
- Share your expectations of your team in a virtual environment

Require video use

- Webcams should be used for <u>every</u> interaction that is not a "quick call"
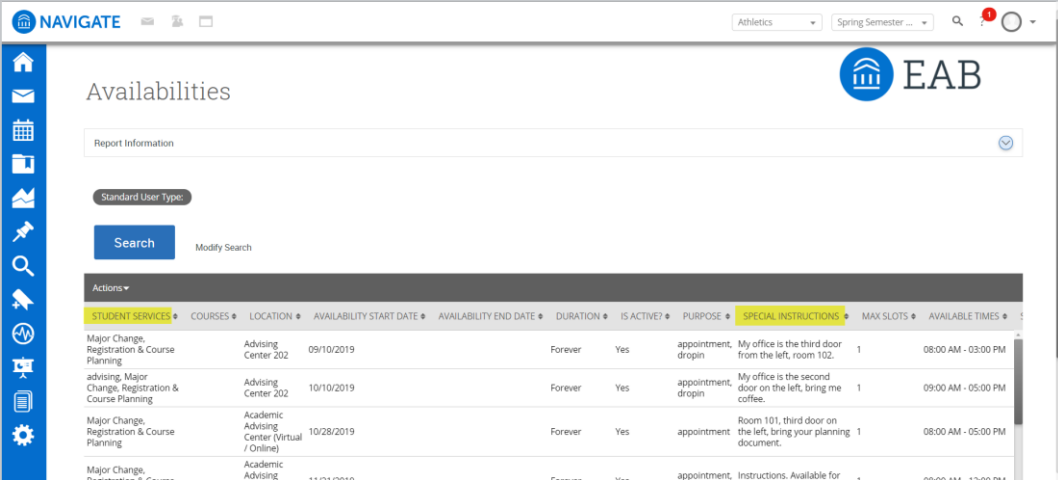- If the question takes longer than 30 seconds, get on video

What needs to be rescheduled/postponed?

- As a team, work through what changes need to be made to meetings and workflow that enable the team to hit its objectives in a virtual environment.
- Collaboration is key at this stage.

Aligning Availability and Services with Need

Ensuring Updates to Office Locations and Reasons for a "Visit"

1

Are services up to date with new, virtual commitments to students? Have other services been inactivated that are unessential right now?

2

Has the Location been updated to match new online offerings? Is there a "phone" location that should be added as well?

3

Are special instructions to the student reflective of our new, remote reality? Are they uniform across the board for advisors and other staff?

Evaluate Differences Between Care Units

Service Naming

One care unit has a long list of services with multiple services categories, while another has only a handful

Locations Offered

Some care units offer both Zoom and phone appointments, while others list on-campus locations

Special Instructions

No continuity in inclusion of URL's or phone numbers, instructions for Zoom or appointment preparedness

Service Naming

Student-centric language

Locations Offered

Virtual meeting types are consistently listed (phone vs. virtual)

Special Instructions

Virtual meeting instructions are clear and consistent

New Appointment Summaries to Reflect New Priorities

Update Appointment Summary Templates

- Add or edit questions to reflect student success priorities

- Refresh staff expectations for student interactions, especially around COVID response

- Prompts serve as discussion guidance to ensure critical topics are raised consistently

Meetings are a primary way for us to get our work done. In a purely remote environment it's vital to follow these guidelines and hold others accountable to these expectations.

Heighten comfort with logistics and video

Who is/isn't dialed in? Can everyone hear? Is everyone using their webcam? Emphasize physical and verbal responsiveness in virtual meetings

Increase emphasis on meeting agendas

Because in-person interaction cannot keep the energy and flow of a meeting at a high level, there must be a clear purpose and agenda for each virtual meeting, ideally communicated in advance

State rules of engagement

How will questions be answered? Remind everyone that one person needs to talk at a time due to slight time lags. Ask people to state their name before asking a question. Should people stay off of mute? Turn off email? Etc.

Drive participation and engagement of every voice

Stating names when asking questions or ensuring if people have questions and polling each person (i.e. "What did you each think about that discussion point?"). Consider a meeting platform that shows attentiveness and navigation away from the meeting.

Press pause

Pause: increase frequency of pulling up or pausing to check in with the group; stop to summarize what you have discussed more often; increase comfort with golden silence

Record it

Record essential meetings and provide the link to meeting participants as a resource.

Agenda, Open-Ended Questions, Video, Collaborative Work, Polls

Use time efficiently to make decisions	Engage team members	Collaborate and share ideas	Surface hidden challenges

Lack of preparation and agenda	*Long didactic presentations*	*Static tools and version control*	*Fewer casual interactions*

Clearly articulate decisions and discussion items

- Don't fall back on open-ended conversation to get to decisions

Assign owners for agenda items

- Resist only one person dominating conversation
- Change voices and pause for specific feedback regularly

Have intentional, interactive moments

- For larger meetings, use breakout room features for discussions
- For smaller meetings, use interactive live tools like note.ly or pinup

Source agenda items broadly

- Create space before, during, and after the meeting to source items
- Consider an agenda tracking system like Asana or Trello

Depending on the number of direct reports you have, you may need to increase the frequency of one-on-one check-ins, especially at the beginning of this period of remote work

✅ **Prioritization exercise:** in your one-on-one check-ins, discuss all current workstreams and what may need to be prioritized or accomplished differently during this time of remote work.

✅ **Look at performance goals:** re-evaluate performance goals for each of your team members to ensure they still make sense, and brainstorm obstacles that may be new or more acute in a remote environment.

✅ **Examine metrics:** work collaboratively to ensure existing metrics are still relevant and if not, figure out new metrics for tracking and accountability.

Working virtually can be difficult and brand new to some. Ensure you are taking the time to understand how to best communicate with each person during this time.

Team Member's Guide: Think through the relevant information that affects your situation. Be honest and incorporate your needs for rest and physical and mental self-care. Feel free to add topics to this list; it is meant to be a starting point. We recognize that this is a fluid situation and encourage employees and managers to revisit this conversation as needs evolve.

Topic	Personal Situation/Description
Childcare Needs - Number and ages of children at home - Needs of children (special care, nap schedules, homeschooling, physical activity, etc.)	
Schedule Impact Time blocks when you are: - Able to work with full focus - Available while also watching children - Not available at all	
Current Work Priorities - Upcoming deadlines (internal and external commitments) - Meetings and/or other responsibilities that may interfere or that don't align with priorities	
Risk Assessment - What deadlines are at risk and what is the impact on the business and/or your team?	

Manager's Guide: Embracing that this crisis causes a need for us to embrace flexible schedules and creative solutions during this time, think through the information that will help your team members contribute to the best of their ability while still ensuring they are managing their family and self-care needs.

Priority discussion topics:

- Identify "essential" activities that absolutely must happen, so that team members know where to focus time in order to maximize their impact.

- Identify activities that do not need to happen during this time – be prescriptive.

- When discussing projects, categorize them as projects that can be done independently vs. projects that need to be done collaboratively. This allows team members to plan their time and identify work blocks when they can collaborate with others and work blocks best suited to independent activities.

- Identify activities that should be prioritized during normal business hours and activities that can be completed before or after hours *if team members are adopting a flextime schedule.*

- **Ensure that team members have built in time for rest and physical and mental self-care. Acknowledge that we cannot work and care for children 24 hours a day.**

Essential Activities (label collaborative or independent)	Intentionally Not Going to Do	Need Coverage/Delegate to Someone Else

Check-In Document - NAME

Weekly Goals and Objectives

• Goal #1	
• Goal #2	
• Goal #3	
• Goal #4	

Daily Status Report
What did you accomplish today?

Roadblocks/ Challenges
Where are you struggling?

Planning Ahead
What's on the horizon?

Things I Need From My Leaders

Help us help you!

Wifi Access

Unexpected demands on bandwidth cause outages at inopportune times

Childcare

Parents forced to balance care and productivity due to closed schools and childcare facilities

Parent or Elder Care

Concerns about the pandemic pushed many people to stay with family or increased caregiving needs

Social Isolation

Lack of interaction with other individuals can increase stress and reduce motivation

Mental Health

Increasingly difficult to access care and participate in routine self-care habits

Routine Disruption

Change in work schedule likely caused a gap in productivity that required some catch up

As a manager in a virtual environment, ensure you are doing the following:

1

Respond as quickly as possible

Understanding you have your own priorities and constraints, try to make yourself as accessible as possible to your team.

➡ **But don't distract your team with too much rapid communication.** Chats and rapid emails make decisions quickly, but they can also distract team members and increase anxiety

2

Set standards for various communication channels

Discuss what communication channels will work best for your team (i.e. quick questions → Slack, tougher questions → phone call, a lot of information/data → email)

➡ **And commit to learning together, including owning when you have done something poorly** by misusing a channel

3

Keep in touch with teammates

Try to maintain a regular cadence of communication and interaction, similar to in-person. This could be as simple as a Slack or other chat conversation to see how they are doing.

Potential Ideas: Create a virtual "watercooler"

Use your team Slack or chat functionality to keep up to date with each other

If you don't have a team Slack or chat function, make one!

Dedicate part of team meetings or set up dedicate time for social interaction with the team. Some teams find a non-work-related question helpful here

Set up time to catch up every other week with members of your team and/or bake it into your one-on-one check-in

1 Set clear expectations for all projects/initiatives

What?

- What is my objective?
- What outcomes should I see?

Why?

- Why is this action important to meeting the need?
- How will this help us meet organizational goals?

Who?

- Who is critical for meeting my objective?
- Who is doing what?

How?

- How should I achieve my objective?
- How will I know if I'm making progress?

When?

- When are key milestones and deadlines?
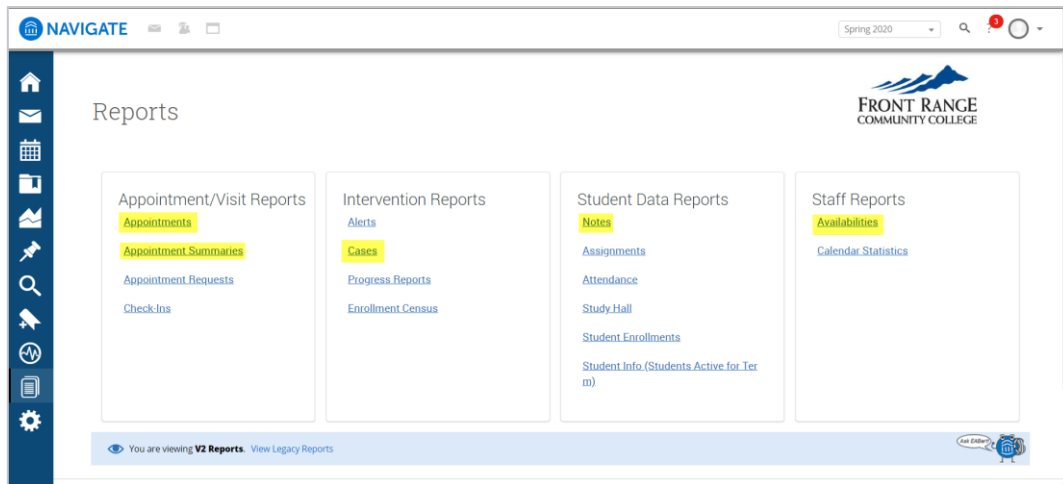- What level of priority should I assign?

2 You can't walk down the hall, but you can have quick check ins

Create a forcing function (could even be a 15 min touch-point) to get status updates on project/initiative progress

Checking on the Results of Interventions in an Uncertain Time

1

Check appointment related reports for pacing of appointments, measuring time period this year vs. last year.
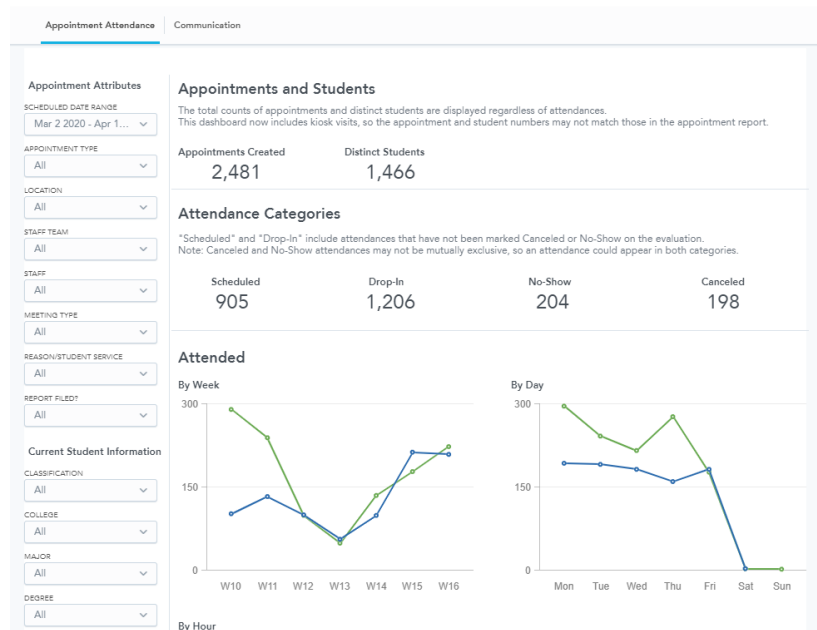
2

Keep an eye on alerts, but especially cases, which, for many, will have changed in scope and expectation.

3

Ensure staff members are updating their availability correctly to reflect new virtual locations, services, and specific instructions.

Leveraging Analytics

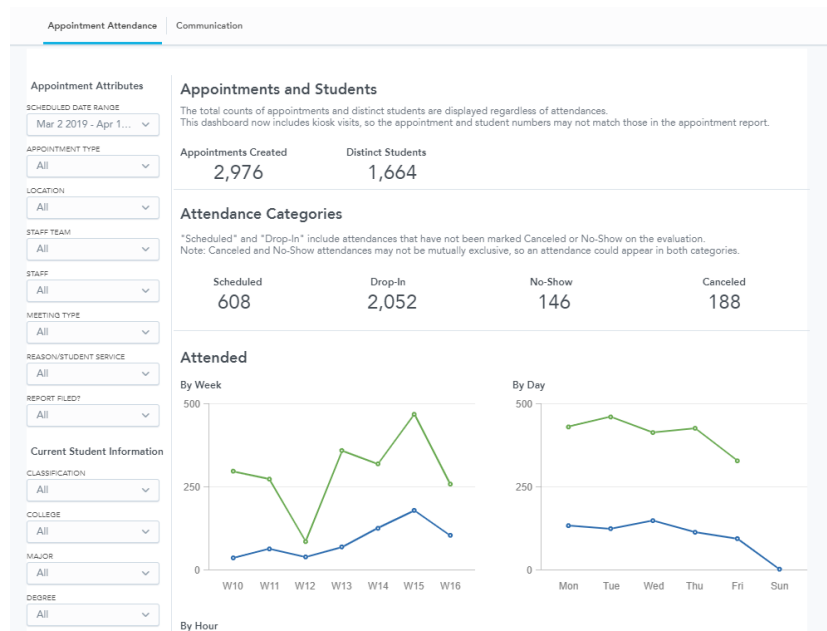Monitoring Services and Performance Year over Year (2020)

- Use top line numbers for appointments created and distinct students seen for a quick "gut check."
- Apply filters on the left-hand panel to further customize data, including pulling in more vulnerable populations via Tags and Categories.
- Note "Scheduled" vs. "Drop-in" disparities to firm up processes for student services and how they are being offered.

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Ensuring Transparency and Visibility on Critical Projects

Sample Project Management Templates

Trello

asana

hive

Gantt Charts, Excel Templates, etc.

Why Adopt a New System Now?

- If there are many new projects starting as a result of Coronavirus, the team may benefit from clearer documentation and progress tracking

- Provides a single source of truth for project status

- Gives a space for collaboration

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How to Use Navigate for Team Management

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