Hybrid Work Training for Managers

2023
- St. John’s Hybrid Work Policy – Modality Designations, Agreement, Requirements,
- Benefits of and Challenges to Hybrid Work
- Effective Work Processes to Manage Hybrid Workers
  - Work schedules, communication plan, assessing progress
- Conducting Business with Hybrid Workers
  - Conducting virtual meetings, delegating, coaching hybrid workers, and conducting performance reviews
St. John’s Hybrid Work Policy

Why?
- **Support for it** – allows flexibility to manage people, time, space and workload more effectively, efficiently and responsively.

Who?
- **Applies to** – full-time and part-time administrators and staff positions assigned to a New York campus location.

What?
- **Hybrid work** – a privilege not an entitlement; granted at sole discretion of the University; based on position not person.
Hybrid Work Modality Designation

- Two designations: “on-campus” or “hybrid eligible”

<table>
<thead>
<tr>
<th>On-Campus</th>
<th>Hybrid Eligible</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Must perform work in person and on campus for entire workweek</td>
<td>• May perform some of the work at an approved off-campus location for scheduled hours or days of their regular workweek</td>
</tr>
<tr>
<td>• Not eligible for regular hybrid work arrangements</td>
<td>• May be required to report to campus on regularly-scheduled remote work hours or days for meetings, events, and other in-person work.</td>
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</table>

Department managers in consultation with Office of Human Resources and appropriate Senior Management Group member must approve all designations.
In exceptional cases, an employee may obtain permission from the Office of Human Resources and the appropriate Senior Management Group member to have a fully remote work arrangement.

Employees with a fully remote work schedule perform all of their work remotely at an approved off-campus location for their entire workweek on a regular basis.
Things to consider when designating position modalities

- Does the position require?
  - Regular presence on campus, e.g., face-to-face contact with students, employees or the public?
  - Ongoing access to campus equipment or materials?
  - Access to confidential, secure, or restricted data that must be accessed on campus?
Does the position,

- Supervise or train others?
- Involve collaborative efforts in the department or with other departments?
- Serve the interests of the University as a hybrid-eligible or on-campus position?

Would a hybrid work arrangement enhance, maintain or diminish operational differences?
Hybrid-eligible employees must have approval from their immediate supervisor and department head.

Employees must have a completed and approved Hybrid Work Agreement in place before they start their hybrid-work schedule.

New employees hired directly into a hybrid-eligible position may be required to maintain an on-campus presence during their orientation period.
Things to consider when approving employees for hybrid work arrangement

- Time with the University – a hybrid work arrangement during an employee’s orientation period is ordinarily not advisable

- Employee’s suitability for hybrid work – performance history, time management, organizational skills, communication skills, level of productivity

- Extent to which employee has demonstrated an understanding of the duties, goals, and responsibilities of the job
## Things to consider when approving employees for hybrid work arrangement

<table>
<thead>
<tr>
<th>Informed by University’s Needs</th>
<th>Informed by Employee’s Needs/Skill Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Recruitment and retention – does remote work attract more candidates?</td>
<td>• Performance can be adequately measured and evaluated</td>
</tr>
<tr>
<td>• Have business continuity and other goals have been considered?</td>
<td>• Employee capable of working with little supervision</td>
</tr>
</tbody>
</table>
All hybrid work arrangements are subject to an initial three-month trial period.

Either the employee or the University can decide to discontinue the work arrangement upon completion of the three-month trial, or sooner if it is determined to be against the best interest of the University.

Periodic reviews of ongoing hybrid work arrangements are conducted to evaluate the arrangement. This review must be conducted annually, at a minimum.
Hybrid Work Requirements: Work Hours

- Work hours, benefits, and time-off accruals are not affected by remote work arrangements.

- Employees are expected to perform work during their regular work hours and must comply with the University's policies related to time off and leave, time recording and overtime; meals and breaks.

- Supervisors must document employees' work hours, vacation and sick time, regardless of work location. **Example:** Maintaining a yearly spreadsheet with time off and overtime annotated will prove helpful.
Hybrid Work Requirements: Work Location

- Hybrid Work Agreements require that approval for the off-campus location be approved by one’s supervisor.

- All approved off-campus work locations must be within reasonable commuting distance to the University (approximately 90 miles) of their assigned campus. The location must be within the United States.

- Exceptions to the reasonable commuting distance must obtain approval from the Office of Human Resources and the appropriate Senior Management Group member due to administrative considerations and potential impact on insurance, payroll and tax requirements. Adjustments to one’s compensation based on the location of the work is the right of the University.
Employees with a hybrid work agreement are responsible for the cost of traveling between their remote and campus locations even if the remote location is beyond the reasonable commuting distance of their assigned campus.

Employees with fully remote work arrangements who are required to travel for University business outside of a reasonable commuting distance, may be reimbursed for travel arrangements that received prior approval from their supervisor.
Employees with hybrid work arrangements that involve working remotely more than 50% of their regular workweek will not be guaranteed a dedicated individual office or workstation on campus.

Most employees with a hybrid arrangement will have access to shared touchdown or hotel space when on campus, exception: positions requiring a higher level of security or confidentiality.
Employees must maintain a dedicated workspace at the approved off-campus location that is safe, secure and hazard free. Should employees sustain a work-related injury during working hours, they must report the injury to their supervisor and to the Department of Public Safety immediately.

Employees must ensure the off-campus work location is free of distractions.

Employees may not serve as the primary care providers for dependents or family members while working remotely.

Employees should have an evacuation plan and a safe exit pathway.
Hybrid Work Requirements: Workspace Guidelines

The workspace should,

- Be restricted to work, and away from the main flow of traffic and distractions
- Be ergonomically appropriate and have a chair with an adjustable seat and back and a desk at a comfortable work height
- Be positioned in proximity to electrical outlets
- Remain free from tripping hazards – loose rugs, cords and wires should be secured
- Consist of surge protectors and avoid overloading a single outlet
- Have a working fire extinguisher and smoke detector
- Maintain good ventilation and adequate heat and cooling
Hybrid Work Requirements: Employee Funding of Workspace

- St. John’s is **not** responsible for expenses associated with setting up and maintaining the remote workspace.

- No University-owned furniture may be removed from an employee’s campus workspace for use in a remote workspace.

- Employees in need of accommodations in their workspace due to medical conditions should review Policy 103 – Disabilities in the Workspace.
Hybrid Work Requirements: Work Equipment

- St. John’s provides one computer device per full-time equivalent based on their role, on a four-year refresh cycle.

- University-provided device must be used for all job functions and employee must be in compliance with Information Technology related policies found in HR Policy Manual, section 900

- University services only University property in need of maintenance and repair, or replacement and not personal equipment

- Computer device must be returned to the University upon termination from employment, or when requested by the University
Employees must comply with all of the University’s Information Technology related policies found in HR Policy Manual, section 900, specifically Policy #910 Remote Access Policy.

Employees may not remove highly sensitive data from the University workspace without the prior written consent of their supervisor.

Employees are expected to ensure the protection of proprietary University information, including confidential student and employee information accessible from their remote work location.
Employees must ensure they are not accessing sensitive information in public spaces using open, unsecured wireless networks.

Recommended steps to secure confidential student and employee information include: use of locked filing cabinets and desks, regular password maintenance, ensuring devices are up to date with latest software versions, only connecting to secured wireless networks, and other appropriate measures.
Employees unable to perform work at their approved off-campus location due to an emergency (power or Internet outage), are expected to report to their assigned campus or use vacation time.

In the event of a campus emergency (e.g., COVID-19, inclement weather, etc.), employees with hybrid work arrangements are expected to perform work at their off-campus location.

Supervisors are authorized to establish emergency hybrid arrangements as needed for the duration of the emergency.
Employees and supervisors must notify Human Resources, via a new Hybrid Work Agreement, of any substantive changes to hybrid work arrangements e.g., change in remote work location, modifying schedule to work remotely more or less than 50% of regular workweek.

Hybrid work arrangements may be discontinued, suspended, or modified by the University at any time.
Benefits, Misperceptions and Challenges of Hybrid Work Arrangement

Hybrid Work Arrangements, work!
Benefits of Hybrid Work

- Enhances Recruitment & Retention
- Allows for More Flexible Staffing Options
- Allows for Services to be Provided During Emergency Situations
- Reduces Demand for Office Space
- Improves Morale and Reduces Stress
“If I approve one hybrid work agreement, I will have to let all my employees work remote.”

“Hybrid work stands in the way of effective teamwork.”

“Once I allow my employee to work remotely, I will never see or hear from them again.”

“Worker productivity will drop if I am not watching my employees every minute.”
## Challenges of Hybrid Work: Operational Adjustments

<table>
<thead>
<tr>
<th>Work Scheduling Requirements</th>
<th>Changes in Manager/Employee Relations</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Plan for meetings to accommodate hybrid workers – fewer impromptu meetings, allow for different technology – TEAMS, WebEx</td>
<td>• Need to informally monitor hybrid workers’ progress – create more checkpoints with them</td>
</tr>
<tr>
<td>• May need to coordinate work assignments with teleworkers’ schedules</td>
<td>• Establish more scheduled meeting times with hybrid workers</td>
</tr>
<tr>
<td>• Hybrid workers should be flexible to accommodate scheduling requirements</td>
<td>• Treat employees the same regardless of their hybrid status</td>
</tr>
</tbody>
</table>
Managers’ Role in Implementing Hybrid Work Model

- University’s hybrid work policy
- How to establish expectations for hybrid workers
- Communication techniques for hybrid workers
- Ways to:
  - measure productivity,
  - conduct virtual meetings,
  - delegate to hybrid workers,
  - coach hybrid workers,
  - conduct virtual performance reviews
Things to consider for hybrid work

- Consider the employees’ job tasks and work habits
- Tasks must be suited to completion in an environment away from campus
- Hybrid worker must have the skills and predisposition to work successfully
- Employee must have prior work performance record that indicates likely success with a hybrid work arrangement
Although the position may be designated as hybrid work eligible, an important factor to consider is the employee themselves. Good candidates for hybrid work are employees who:

- Prove they can work with minimal direct supervision
- Demonstrate they can deliver the deliverables on time and according to specifications
- Demonstrate good time management skills
- Possess the ability to initiate and guide their own work
- Communicates effectively with others, using a mix of personal and electronic means (phone, TEAMS, WebEx, email, etc.,)
Ideally, work should be divided so that tasks that can be performed off campus are done remotely and tasks that require an on-campus presence are performed on campus.

The University’s hybrid work policy should be the foundation of the decision. Other factors to consider:

- Needs of coworkers and clients
- Manager’s determination of number of days per week the employee can be out of the office
- Hybrid worker’s comfort level with the number of days they are willing to work away from campus
- Any limitations on office space availability on campus
Arrange hybrid work schedules primarily to meet the needs of the University, not the convenience of the hybrid worker. The latter is important but is not the main objective.

Keep coverage in mind, remembering that coverage is more important than convenience.

Flexibility on both sides is crucial. Hybrid workers must understand there are times when they are needed in the office on a planned remote day, and you as the manager, should be open to requests for schedule changes from the hybrid workers.
To see at-a-glance who is working remotely and who is in the office, create a hybrid staffing plan.

<table>
<thead>
<tr>
<th>Office Workers</th>
<th>Remote Workers</th>
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### Staffing Plan - In the Office

<table>
<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
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<tbody>
<tr>
<td>Steve Smith</td>
<td>Mary Doyle</td>
<td>Steve Smith</td>
<td>Mary Doyle</td>
<td>Mary Doyle</td>
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<tr>
<td>Payroll</td>
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<tr>
<td>Jeff Zec</td>
<td>Helen Mulvehil</td>
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<tr>
<td>Benjamin Jones</td>
<td>Barbara Fahey</td>
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<tr>
<td>Chris Haggerty</td>
<td>Mary Doyle</td>
<td>Chris Haggerty</td>
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<td>Payroll</td>
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<tr>
<td>John Smith</td>
<td>Remote Worker</td>
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### Staffing Plan - Working Remote

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</table>
All administrators need to accurately maintain attendance records for all employees whether or not they are working remotely. It is recommended that for each direct report, that administrators maintain an attendance log.
|     | 1   | 2   | 3   | 4   | 5   | 6   | 7   | 8   | 9   | 10  | 11  | 12  | 13  | 14  | 15  | 16  | 17  | 18  | 19  | 20  | 21  | 22  | 23  | 24  | 25  | 26  | 27  | 28  | 29  | 30  | 31  | Vac Days | Sick & Safe Hours | Comments | Covid Related Hours/Days |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| January | R   | R   | H   | R   | R   | R   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     | 1.00 | work remote when able | 4 |
| February | R   | R   |     | H   | V   | R   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| March | R   | R   | V   | R   | R   | R   | S   | S   | S   | S   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| April | S   | R   | H   | H   | H   | H   | R   | R   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     | 4.00 | work remote when able | 4 |
| May | R   | R   | H   | R   | R   | V   | H   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| June |     |     | V   | H   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| July |     |     |     |     |     |     |     |     |     | H   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| August |     |     |     |     |     | V   | V   | V   | V   | V   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| September | R   | H   | R   | R   | R   | V   | V   | R   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| October |     |     |     |     |     |     |     |     |     |     |     | H   | H   | R   | R   | R   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| November |     |     | V   | V   | H   | V   | R   | H   | H   | H   | H   | H   | H   | H   | H   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| December | V   |     | V   | V   | V   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |

**Key:**
- S = Sick Day
- J = Jury Duty
- P = Personal Day
- C = Comp Day
- V = Vacation Day
- LW = Leave with Pay
- D = Death in Family
- LO = Leave without Pay
- H = Holiday
- R = Remote work Day
Develop a Work Plan to Meet Expectations

As the manager, you set the tone and establish the expectations for employees working a hybrid work schedule. Things to consider,

- **Objectives** that will be met
- **Tasks** to be completed
- **Work product** to be delivered
- **Time Frame** for completing tasks
- **Schedule** for accomplishing interim milestones (for longer term assignments)
- **Who/What** – who else needs to be involved and what resources are needed
- **Criteria** – establish the standard for evaluating performance
Hybrid Work Requires Trust

- When managing hybrid workers, ensuring trust between manager and employee is more important than ever.

- Managers must trust that they have seen enough examples in an employee’s performance that indicate the employee is willing and able to do what is expected without having the manager closely monitor and follow up on each assignment.
Establishing a Communication Plan
Establishing a Communication Plan

- Key to succeeding as a manager of hybrid workers is to establish an effective communication plan.

- Some workers may need and benefit from a daily check-in to review what they are doing, what their next task is and what problems they are experiencing.

- Other workers may require less frequent contact with you but may need to collaborate regularly with coworkers.
Establishing a Communication Plan

Tips to keep in mind when determining the best communication methods:

- Your hybrid workers should be reachable in roughly the same ways as the on-campus workers (via email, phone, TEAMS, voicemail). Reminder: Employees should forward work calls to their cell phone or remote phone. Use the call forward feature on your phone or submit a ticket with IT and request EC 500 call forwarding service (available to full-time admin and staff) or use TEAMS Voice (available to full-time admin and staff).

- You probably do not need to reach your hybrid workers immediately all the time, but you need to agree on a time when you will be able to reach them, or at least hear back from them if you leave a voice mail or send an email.

- Hybrid workers should have the same responsiveness when working off campus as they do on campus. Calls should be returned within the same interval whether working off- or on-campus.
Measuring Productivity

Performance measures should be the same for both on-campus and hybrid workers. Productivity measures include:

- **Quality** – degree of excellence achieved
- **Quantity** – extent, size, sum of countable or measurable discreet events or objects expressed as a numerical value
- **Timely and appropriate** – submission of work, responses to email, phone calls, requests, inquiries
- **Written and verbal progress** – progress achieved to date
When Technology Fails

- Ask employee to inform you of technological issues/failure
- Ensure employees maintain projects, assignments, and important information via a backup system to access when technology fails
- Ensure employees know how to submit an IT Help Desk Ticket for support
- Alternate work schedule to report to campus if necessary
Conducting Virtual Meetings
Conducting Virtual Meetings: Planning the Meeting

- Share agenda at time of sending the meeting invite
- Goal of meeting should be indicated on agenda
- Plan for no more than 3 items for a 30-minute meeting
- Allocate time for each agenda item
- Use the live meeting format when you need to speak with multiple people at one time, receive and give feedback or conduct brainstorming sessions

Note: For status updates and announcements consider using Zoom or Cisco WebEx to record a message and send out via a link for others to listen. This avoids video fatigue.
Hybrid & Virtual Meeting Basics

• Ensure all participants have the technology & equipment to make for equitable experience
• Ensure everyone feels included
• Everyone should have video on – it is important to see body language and facial expressions
• All participants should,
  ➢ Turn off self-view, focus on other people
  ➢ Maintain eye contact – look at the camera or a little below the camera
  ➢ Show your hands – this creates a more natural expression
  ➢ Ensure they have privacy when participating in meetings and not use the speakerphone feature when others are present or within earshot. Avoid having others around them listening to what is being said in the meetings.
Encouraging Engagement in Hybrid Meetings

- Consider calling on remote employee first so they don’t feel excluded from the conversation
- Pay attention to the Chat box and acknowledge comments
- Pause a little longer than feels comfortable after asking a question – research shows participants don’t want to speak over others therefore they delay in responding to questions
- Use the raised hand for more than 4 people
- Use slides with polls and quizzes to solicit feedback and input
- Use blank whiteboard for in-meeting documentation
After Meeting Activities

- Summarize the conversation
- Communicate deadlines and action items
- Distribute notes to participants and all relevant stakeholders
Delegating to Hybrid Workers
Steps for Effective Virtual Delegation

- Clarify what you are delegating
- Consider employee’s skills, interests and goals
- Place the task in context – explain the big picture to the employee
- Agree on expectations – what does the finished product look like, due date, checkpoints
Communication Tools to Support Virtual Delegation

- Use Microsoft TEAMS to communicate and share documents
- Ask employees to submit scheduled updates on a regular basis
- Create a questions and obstacles section in a TEAMS document so you and employees can ask and respond to questions
- Use email when including external vendors
Establishing Trust & Rapport for Effective Delegation

- Get to know each employee
- Let employees get to know you
- Maintain consistency – is your mood even-keeled, can you be counted on, do you maintain a consistent meeting schedule
- Don’t gossip about others
To avoid misunderstandings, discuss with employees, best way to communicate on projects

- Do they prefer to talk things through?
- Do they prefer to send an email with questions and then call to discuss?
- Do they submit early drafts of projects? Submit when finished?
- Clarify mutual expectations in advance when delegating assignments.
To address mistakes made by employees and to help build skills,

- Do not fix the problem yourself
- Analyze the root causes of problems
  - did they not know the audience?
  - did they not have all the information?
- Set up a coaching conversation
- Discuss assignment vs. the outcome and the gap
- Agree on action – how will the problem be corrected? Avoided in the future?
Virtual Debriefing Elements

To discuss virtual delegation assignments and to help build skills, ask the following during post-assignment debriefing sessions:

- What went well?
- What did not go well?
- What skills did they sharpen?
- What skills did they use for the first time?
- What skills would they like to continue to build?
Coaching Hybrid Workers
Coaching Hybrid Workers to provide feedback

To provide feedback when you noticed something that needs to be corrected, use the following strategy:

<table>
<thead>
<tr>
<th>Feedback Elements</th>
<th>Narrative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide context</td>
<td>“The late submission of your reports is a problem.”</td>
</tr>
<tr>
<td>Give observable facts</td>
<td>“Your last 3 monthly reports were submitted 7-10 days late.”</td>
</tr>
<tr>
<td>Describe impact</td>
<td>“When you submit the report late, it results in the rest of the team having to scramble to incorporate your data into the overall section’s report. This is unacceptable.”</td>
</tr>
<tr>
<td>Ask for solution</td>
<td>“What can you do to ensure your report is submitted on time?” Accept silence and listen to employee’s proposed solution.</td>
</tr>
</tbody>
</table>
Coaching Hybrid Workers for Personal Growth

To help employees think about goals and how to achieve them, set up time to help employees with goal setting. Use the GROW* model:

<table>
<thead>
<tr>
<th>Goal</th>
<th>Reality</th>
<th>Options</th>
<th>Way Forward</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ What’s a goal you would like to set for yourself?</td>
<td>➢ What’s your current reality?</td>
<td>➢ How will you resolve the gap?</td>
<td>➢ What is your next step?</td>
</tr>
<tr>
<td>➢ Are there interim steps to get there?</td>
<td>➢ What is working well?</td>
<td>➢ What has worked for you already?</td>
<td>➢ When should we meet to check on your progress?</td>
</tr>
<tr>
<td>➢ How will you know you have reached the goal?</td>
<td>➢ What do you need to do to get to the next level?</td>
<td>➢ What do you need from me?</td>
<td></td>
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</tbody>
</table>
Good managers help employees grow and develop. Use these strategies to help hybrid workers when coaching for career mobility.

- Help employees assess their strengths and weaknesses
- Discuss interests and aspirations with employees
- Help identify necessary skills and experiences to support their development
- Help them to develop a written plan with dates to get them to where they want to go
Coaching Hybrid Workers Reminders

With employees you do not see each day, you need to be intentional with scheduling time to coach your hybrid workers.

Schedule time to meet with them (those daily, impromptu interactions that you have with employees in the office are not occurring with hybrid workers)

Establish trust with hybrid workers - misunderstandings can happen more frequently in remote settings. You may need to explain more to your hybrid workers and ask for frequent and scheduled updates from hybrid workers.

Show consistency
Conducting Virtual Performance Reviews
Assessing performance virtually consists of three things:

- **Defining performance** – defining goals achieved and competencies demonstrated

- **Creating spaces/opportunities for observations** – need to be intentional (schedule one-on-one meetings; observe in group meetings; seek anonymous feedback from colleagues and clients; read status reports; review goal sheets)

- **Documenting performance** – keep track of employee’s accomplishments
Use RED Evaluation to document performance

Consider asking employees to respond to the following questions in their self-appraisals:

- What did you do this year that makes you proud?
- What do you wish you had done differently?
- What did you learn?
- What do you want to work on for next year?
You may want to obtain anonymous feedback from others who work with your direct report(s) to help balance your observations. Potential questions to ask of others:

- What are the person’s strengths?
- What should the person continue doing?
- What should the person stop doing?
- What are some suggestions on how this person could improve performance?
- Cross-check others’ feedback with your own observations.
Conducting Performance Evaluation Meeting

- **Establish the right setting**
  - Put video and camera on
  - Conduct in quiet setting
  - Dress professionally
  - Add emphasis to gestures and facial expressions
  - Get comfortable with silence

- **Adopt a coaching mindset**
  - Focus on strengths first
  - Use examples to demonstrate your point
  - Use proper tone and language to lend support
  - Critique not criticize employee’s performance
To help your direct report see the importance and value of the performance evaluation meeting, you can start the conversation by stating:

“I’m actually glad we are getting the time to reflect together, and I’m glad we are doing this performance review.”

“Let me start by sharing some of the key themes I noticed this year, then I’d like to hear what resonates with you.”

“I think it will be helpful to review the year together, look at your career development goals, and build a strategy for next year.”
During the review meeting

- Share the review during the meeting so both can see it simultaneously
- Alternate looking at the camera (maintain eye contact) and at the employee for signs of their body language, facial expressions, etc.
- Start with the positive feedback
- Offer constructive feedback in areas where employee can improve
- Offer examples of performance to support your comments
- Summarize key themes
Conducting Performance Evaluation Meeting

Dealing with emotions during the review

Addressing Tears
- “I know these things can be emotional. Do you need a minute?”
- “What’s causing your emotion? Can you talk about it?”

Addressing Defensiveness
- Do not match defensiveness with defensiveness, pause, take a breath, and show compassion.
- “It seems to me that you are getting a little defensive and it is not my intention to cause you excitement. I have some things to share that I know are difficult to hear, and my hope is that we can talk about them and make a plan for next year.”
## Virtual Performance Review Best Practices

<table>
<thead>
<tr>
<th>Before the review</th>
<th>During the review</th>
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<tbody>
<tr>
<td>• Communicate the process</td>
<td>• Ask what resonates with employee (what made them most proud, what do they wish they had done better)</td>
</tr>
<tr>
<td>• Ask employee for self-appraisal</td>
<td>• Schedule plenty of time for the review (1 hour)</td>
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<tr>
<td>• Obtain feedback from others</td>
<td>• Use examples to support your comments/rating</td>
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<td></td>
<td>• Soften your tone during the review</td>
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</table>
- Successful hybrid work arrangements meet both management’s and employee’s needs
- Hybrid work agreements must give you and your employees a clear understanding of the terms and conditions of the work arrangement
- Hybrid work arrangements are not permanent and can be modified or revoked as needed
- Manage your employees by results
- Communication should flow with your hybrid workers just as it does with workers on campus
- Monitor your hybrid workers’ productivity using a variety of measures (quality, quantity, timeliness, responsiveness)
Sources

- Coaching Virtually, LinkedIn Learning
- Delegating at a Distance, LinkedIn Learning
- Remote Work, National Institute of Health
- Telecommuting for Managers, Office of Personnel Management
- Telework and Telecommuting, Corporate Training Materials
- Virtual & Hybrid Meeting Essentials, LinkedIn Learning
- Virtual Performance Reviews and Feedback, LinkedIn Learning
Thank You