



ST. JOHN'S  
UNIVERSITY

# 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”

On-Campus	Hybrid Eligible
<ul style="list-style-type: none"><li>Must perform work in person and on campus for entire workweek</li></ul>	<ul style="list-style-type: none"><li>May perform some of the work at an approved off-campus location for scheduled hours or days of their regular workweek</li></ul>
<ul style="list-style-type: none"><li>Not eligible for regular hybrid work arrangements</li></ul>	<ul style="list-style-type: none"><li>May be required to report to campus on regularly-scheduled remote work hours or days for meetings, events, and other in-person work.</li></ul>

**Department managers in consultation with Office of Human Resources and appropriate Senior Management Group member must approve all designations.**

# Hybrid Work Exceptions



- 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.



- 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.



- 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

## *What* **Remote Work Skills**

*Do Employers  
Want?*



## Things to consider when approving employees for hybrid work arrangement

Informed by University's Needs	Informed by Employee's Needs/Skill Level
<ul style="list-style-type: none"><li>Recruitment and retention – does remote work attract more candidates?</li></ul>	<ul style="list-style-type: none"><li>Performance can be adequately measured and evaluated</li></ul>
<ul style="list-style-type: none"><li>Have business continuity and other goals have been considered?</li></ul>	<ul style="list-style-type: none"><li>Employee capable of working with little supervision</li></ul>

# Trial Period and Periodic Reviews



- 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.

## Employee yearly attendance sheet

	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										H						R															
February					R							R						R			H	V					R						1.00					
March				R								R				V				R							R			S	S	S	S	1.00		work remote when able		
April	S								R							H	H			H				R						R					work remote when able			
May							R																					V			H			1.00				
June																		V				H												1.00				
July				H															V	V								V	V					4.00				
August																				R												S		2.00	2.5			
September		R			H						R							R														R			2.00			
October								R																R											0.00			
November					R												V	H																2.00				
December		V																																	3.00			
	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	17.000	2.5					
<div>KEY:</div> <div>S=Sick DayJ=Jury Duty</div> <div>P=Personal DayC=Comp Day</div> <div>V=Vacation DayLW=Leave with Pay</div> <div>D=Death in FamilyLO=Leave without Pay</div> <div>H=HolidayR=Remote work Day</div>																																						

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# 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.



# Hybrid Work Requirements: Travel

- 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.



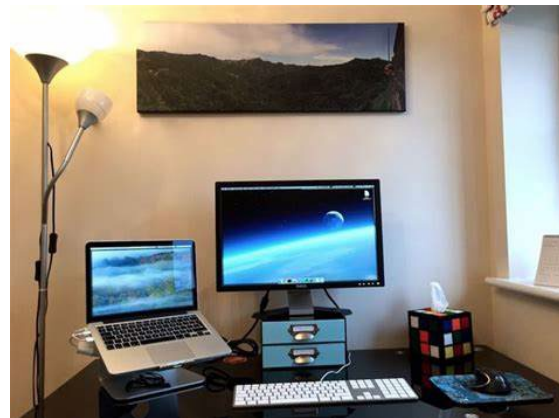
# Hybrid Work Requirements: Workspace



- 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.

# Hybrid Work Requirements: Workspace

- 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.







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

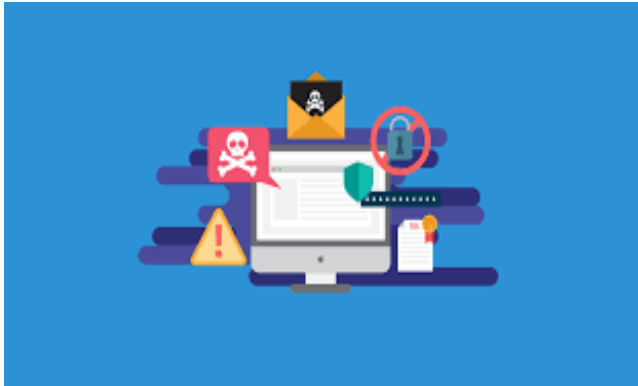


- St. John's provides one computer device per full-time equivalent based on their role, on a four-year refresh cycle.
- University-provided device must be used for all job functions and employee must be in compliance with Information Technology related policies found in HR Policy Manual, section 900
- 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



## Hybrid Work Requirements: Changes to Hybrid Work Arrangements

**ATTENTION!!**  
**SCHEDULE**  
**CHANGE**

- 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

Reduces  
Demand for  
Office Space

Allows for More  
Flexible Staffing  
Options

Allows for Services  
to be Provided  
During Emergency  
Situations

Improves Morale  
and Reduces  
Stress

# Challenges of Hybrid Work: Misperceptions

“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.”

Work Scheduling Requirements	Changes in Manager/Employee Relations
<ul style="list-style-type: none"><li>Plan for meetings to accommodate hybrid workers – fewer impromptu meetings, allow for different technology – TEAMS, WebEx</li></ul>	<ul style="list-style-type: none"><li>Need to informally monitor hybrid workers' progress – create more checkpoints with them</li></ul>
<ul style="list-style-type: none"><li>May need to coordinate work assignments with teleworkers' schedules</li></ul>	<ul style="list-style-type: none"><li>Establish more scheduled meeting times with hybrid workers</li></ul>
<ul style="list-style-type: none"><li>Hybrid workers should be flexible to accommodate scheduling requirements</li></ul>	<ul style="list-style-type: none"><li>Treat employees the same regardless of their hybrid status</li></ul>

- 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



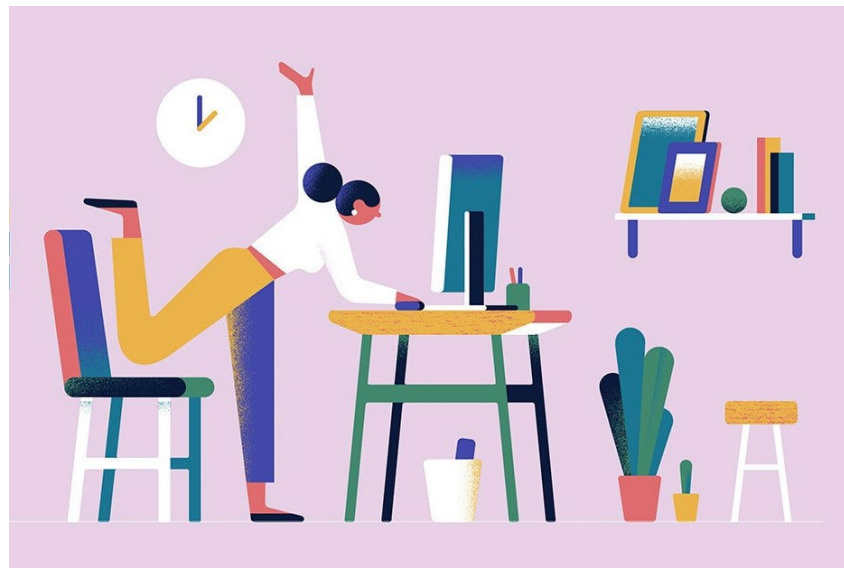
- Consider the employees' job tasks and work habits
- Tasks must be suited to completion in an environment away from campus
- Hybrid worker must have the skills and predisposition to work successfully
- Employee must have prior work performance record that indicates likely success with a hybrid work 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.,)



# Determining Hybrid Arrangements

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

Keep these points in mind about hybrid work schedules



- **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.



## Maintaining a Hybrid Work Staffing Plan

To see at-a-glance who is working remotely and who is in the office, create a hybrid staffing plan.

## Office Workers

### STAFFING PLAN - IN THE OFFICE

Monday	Unit	Tuesday	Unit	Wednesday	Unit	Thursday	Unit	Friday	Unit
<b>*Steve Smith</b>	Payroll	<b>*Mary Doyle</b>	Payroll	<b>*Steve Smith</b>	Payroll	<b>*Mary Doyle</b>	Payroll	<b>*Mary Doyle</b>	Payroll
<i>Benjamin Jones</i>	Payroll	<i>Jeff Zec</i>	Payroll	<i>Benjamin Jones</i>	Payroll	<i>Jeff Zec</i>	Payroll	<i>Benjamin Jones</i>	Payroll
Helen Mulvehill	Training	Barbara Fahey	Training	Helen Mulvehill	Training	Barbara Fahey	Training	Jeff Zec	Payroll
Jan Albanese	Benefits	Christopher Happell	Benefits	Jan Albanese	Benefits	Christopher Happell	Benefits	Helen Mulvehill	Training
Patty Lane	Benefits	Debra Haggerty	Benefits	Patty Lane	Benefits	Debra Haggerty	Benefits	Barbara Fahey	Training
George Santos	Recruitment	Thomas Fitzgerald	Recruitment	George Santos	Recruitment	Thomas Fitzgerald	Recruitment	Christopher Happell	Benefits
Tim Studer	Recruitment	Dorothy Russell	Recruitment	Tim Studer	Recruitment	Dorothy Russell	Recruitment	Jan Albanese	Benefits
Cheryl Werhle	Compliance	Jeremiah Bannon	Compliance	Cheryl Werhle	Compliance	Jeremiah Bannon	Compliance	Debra Haggerty	Benefits
Ebony Jones	Compensation	Paul Cooper	Compensation	Ebony Jones	Compensation	Paul Cooper	Compensation	Thomas Fitzgerald	Recruitment
Donna McManus	HR AVP	Catherine Harper	HR AVP	Donna McManus	HR AVP	Catherine Harper	HR AVP	Tim Studer	Recruitment
<b>Bold - front desk coverage; <i>Italics - front desk backup</i></b>								Dorothy Russell	Recruitment
10		10		10		10		Jeremiah Bannon	Compliance
<b>STAFFING PLAN - WORKING REMOTE</b>								Paul Cooper	Compensation
								Ebony Jones	Compensation
								Donna McManus	HR AVP

## Remote Workers

### STAFFING PLAN - WORKING REMOTE

Monday		Tuesday		Wednesday		Thursday		Friday	
Unit	Unit	Unit	Unit	Unit	Unit	Unit	Unit	Unit	Unit
Mary Doyle	Payroll	Steve Smith	Payroll	Mary Doyle	Payroll	Steve Smith	Payroll	Steve Smith	Payroll
Jeff Zec	Payroll	Benjamin Jones	Payroll	Jeff Zec	Payroll	Benjamin Jones	Payroll	Patty Lane	Benefits
Barbara Fahey	Training	Helen Mulvehill	Training	Barbara Fahey	Training	Helen Mulvehill	Training	George Santos	Recruitment
Christopher Happell	Benefits	Jan Albanese	Benefits	Christopher Happell	Benefits	Jan Albanese	Benefits	Cheryl Werhle	Compliance
Debra Haggerty	Benefits	Patty Lane	Benefits	Debra Haggerty	Benefits	Patty Lane	Benefits	Catherine Harper	HR AVP
Thomas Fitzgerald	Recruitment	George Santos	Recruitment	Thomas Fitzgerald	Recruitment	George Santos	Recruitment		
Dorothy Russell	Recruitment	Tim Studer	Recruitment	Dorothy Russell	Recruitment	Tim Studer	Recruitment		
Jeremiah Bannon	Compliance	Cheryl Werhle	Compliance	Jeremiah Bannon	Compliance	Cheryl Werhle	Compliance		
Paul Cooper	Compensation	Ebony Jones	Compensation	Paul Cooper	Compensation	Ebony Jones	Compensation		
Catherine Harper	HR AVP	Donna McManus	HR AVP	Catherine Harper	HR AVP	Donna McManus	HR AVP		
10		10		10		10		5	

# Maintaining Attendance Records

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.





# Employee Attendance Record

	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								
February				R							R							R			H	V				R						1.00				
March				R							R			V				R							R			S	S	S	S	1.00		work remote when able	4	
April	S						R							H	H			H				R							R						work remote when able	4
May						R							R							R							V			H			1.00			
June																V				H													1.00			
July				H														V	V							V	V						4.00			
August											V	V							R								R			S			2.00	2.5		
September		R			H				R							R						V	V							R			2.00			
October							R			H				R						R									R				0.00			
November				R						V	H			V				R							H	H							2.00			
December		V							V							V								H	H	H	H	H	H	H	H		3.00			
	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	17.000	2.5			
KEY:																																				
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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

**Work plans  
should  
complement,  
not replace,  
current  
processes and  
procedures.**

# Hybrid Work Requires Trust

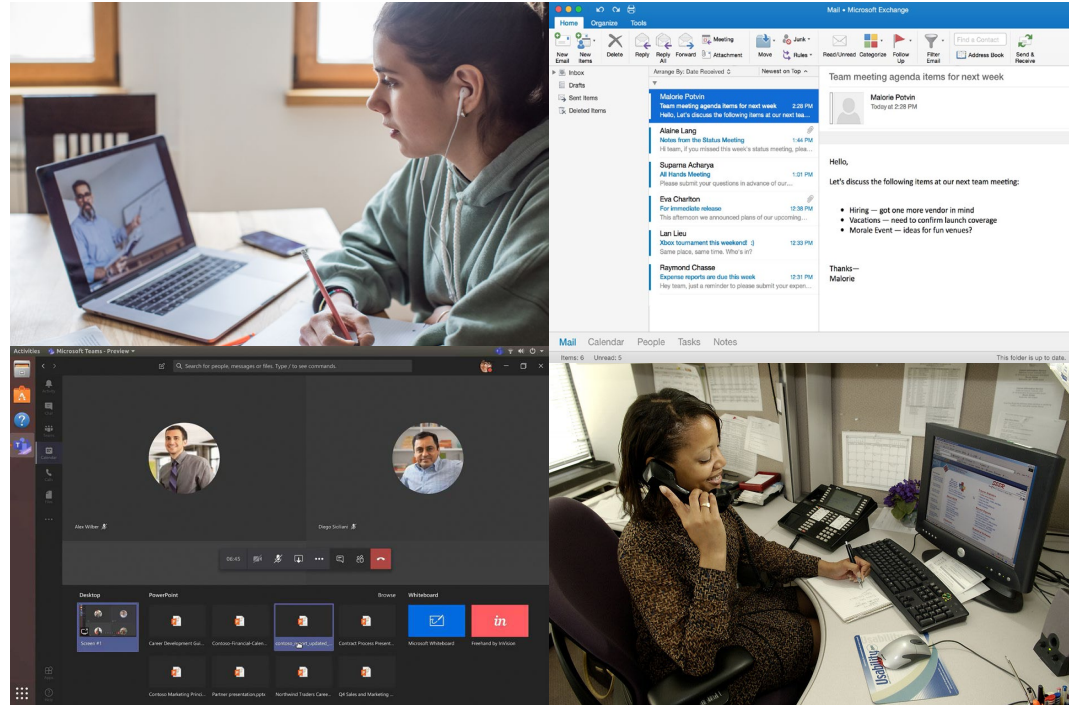


- When managing hybrid workers, ensuring trust between manager and employee is more important than ever.
- Managers must trust that they have seen enough examples in an employee's performance that indicate the employee is willing and able to do what is expected without having the manager closely monitor 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.



## 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.





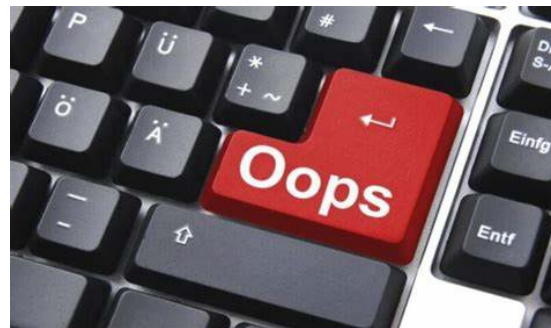
Performance measures should be the same for both on-campus and hybrid workers. Productivity measures include:

- **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

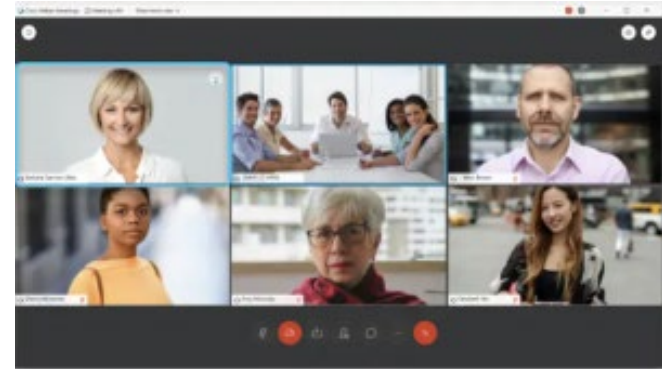
- Share agenda at time of sending the meeting invite
- Goal of meeting should be indicated on agenda
- Plan for no more than 3 items for a 30-minute meeting
- Allocate time for each agenda item
- Use the live meeting format when you need to speak with multiple people at one time, receive and give feedback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

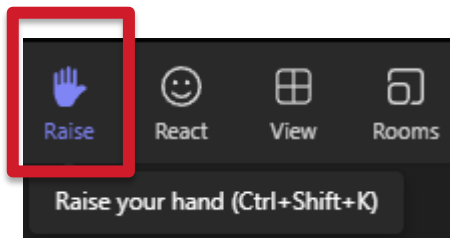
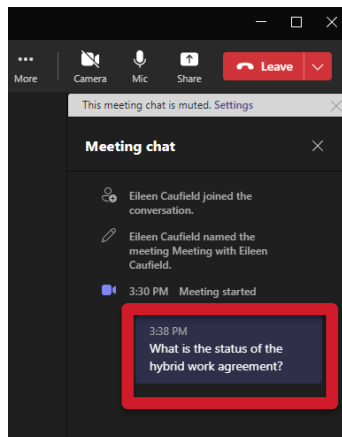


**Note:** For status updates and announcements consider using Zoom or Cisco WebEx to record a message and send out via a link for others to listen. This avoids video fatigue.

# 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.





- 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



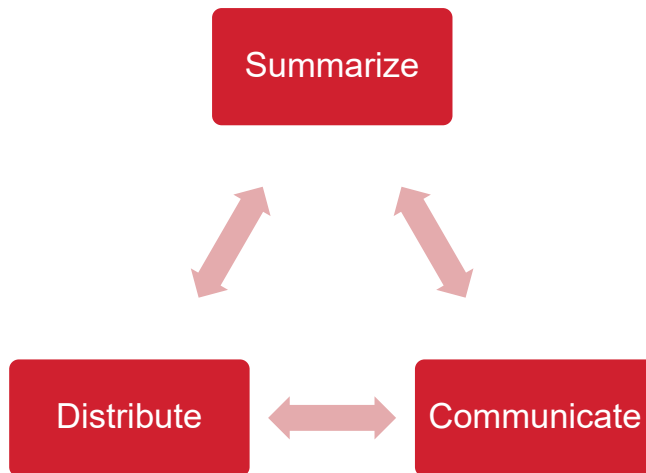
# After Meeting Activities

- Summarize the conversation
- Communicate deadlines and action items
- Distribute notes to participants and all relevant stakeholders

## Sample

### Meeting Template – Meeting Notes

Meeting/Project Name:		
Date of Meeting: (MM/DD/YYYY)		Time:
Meeting Notes Prepared by:		Location:
1. Meeting Purpose		
2. Meeting Objectives		
3. Attendance at Meeting		
Present:		
Absent:		
4. Agenda Topic, Key Issues, and Decisions/Recommendations		
Agenda Topic	Key Issues	Decision/Recommendations
5. Action Items		
Action	Responsible Party	Due Date
6. Next Meeting (if applicable)		
Date:	Time:	Location:
		Purpose:



# 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



- 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





- 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.

# Addressing Mistakes Virtually

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:

Feedback Elements	Narrative
<b>Provide context</b>	“The late submission of your reports is a problem.”
<b>Give observable facts</b>	“Your last 3 monthly reports were submitted 7-10 days late.”
<b>Describe impact</b>	“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.”
<b>Ask for solution</b>	“What can you do to ensure your report is submitted on time?” Accept silence and listen to employee’s proposed solution.



# 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:

## Goal

- What's a goal you would like to set for yourself?
- Are there interim steps to get there?
- How will you know you have reached the goal?

## Reality

- What's your current reality?
- What is working well?
- What do you need to do to get to the next level?

## Options

- How will you resolve the gap?
- What has worked for you already?

## Way Forward

- What is your next step?
- When should we meet to check on your progress?
- What do you need from me?

# Coaching Hybrid Workers for Career Mobility

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 of Hybrid Workers

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**

## Recognize Excellence and Development (RED)

Revised 8/4/2022

Employee's Name: Regina Doyle	Supervisor's Name: Patsy Jones
Title: Associate Director, Training & Development	Title: Associate Vice President for Human Resources
Email: <a href="mailto:doyle@stjohns.edu">doyle@stjohns.edu</a>	Email: <a href="mailto:jones@stjohns.edu">jones@stjohns.edu</a>
XNumber: X0000000	XNumber: X0000000
School or Department: Human Resources	
Periodic Check In Date:	Final Assessment Date: 09/20/2022

### Objectives/Key Responsibilities – 60% overall weighting

Objectives	Rating/Weight
<b>#1 Objective/Key Responsibility:</b> Design and Delivery of Training Programs - Continue to deliver to the University Community ongoing training and development workshops in both in-person and webinar formats throughout the year with the goal of achieving overall evaluation ratings of 90% very good/excellent.	EP Weighting: 50%
<b>#2 Objective/Key Responsibility:</b> Training Administration - On a weekly basis, download the online Canvas completion results for the mandatory training programs (annual discrimination for adjuncts, affiliates, full-time faculty and Gas and student workers; Active Shooter for all adjuncts, Emergency Readiness for adjuncts and full-time faculty; Title IX for adjuncts); and the SANS training of Core Security Training, Recertification Training and PII Training on behalf of Information Technology and upload the completions into Banner. Monitor the new hire lists and enroll all new hires into the required training programs.	PW+ Weighting 15%

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

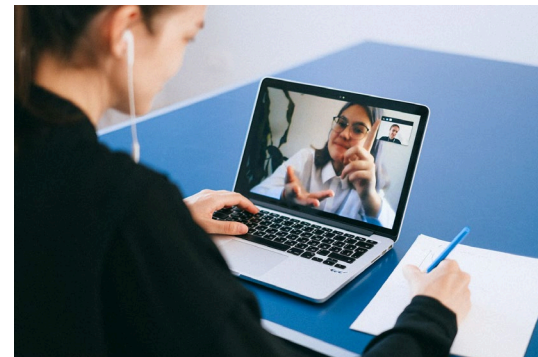
- What did you do this year that makes you proud?
- What do you wish you had done differently?
- What did you learn?
- What do you want to work on for next year?

**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.

- **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

## 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.”

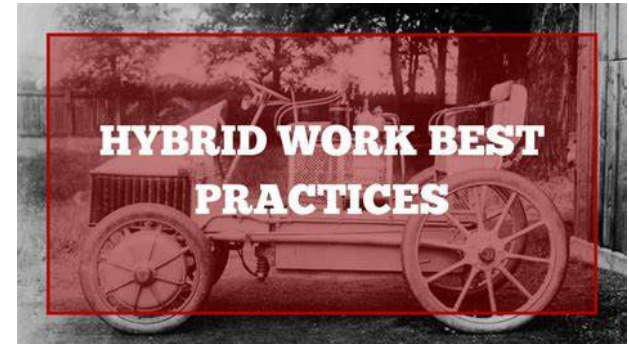


# Virtual Performance Review Best Practices

Before the review	During the review
<ul style="list-style-type: none"><li>• Communicate the process</li></ul>	<ul style="list-style-type: none"><li>• Ask what resonates with employee (what made them most proud, what do they wish they had done better)</li></ul>
<ul style="list-style-type: none"><li>• Ask employee for self-appraisal</li></ul>	<ul style="list-style-type: none"><li>• Schedule plenty of time for the review (1 hour)</li></ul>
<ul style="list-style-type: none"><li>• Obtain feedback from others</li></ul>	<ul style="list-style-type: none"><li>• Use examples to support your comments/rating</li></ul>
	<ul style="list-style-type: none"><li>• Soften your tone during the review</li></ul>

# Hybrid Work Reminders

- 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)



- *Coaching Virtually*, LinkedIn Learning
- *Delegating at a Distance*, LinkedIn Learning
- *Guide to Telework in the Federal Government*, Office of Personnel Management
- *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

