Seven Secrets of Effective Remote Supervision Uncovered

1. **It Starts with You.**

   Whether you are in person or virtual, you need to be sure you set a good example. You need to be organized and know how you work best to communicate this message to your staff. Remember that you are modeling the behavior you expect to see in them.

   Be inquisitive:

   ☐ Ask people how they want to be managed remotely and ask how you can support them.

   ☐ Ask what working conditions are best for them

   ☐ Build rapport with every member of the team- get to know them as a complete person.

   ☐ Understand the unique circumstances of each employee- each has a different home environment. Some have spouses and children, some have private home offices, and some will be taking meetings in the closet, bedroom, or bathroom. Some may be experiencing challenges in their relationships.

   Be flexible and empathetic:

   ☐ As long as work is being completed on time and to the standards, does it matter how and when it gets done?

       o For those non-exempt employees, you need to follow the FLSA--work with your HR regarding parameters to have in place there.

   ☐ Example: Shannon in PA- She has this saying hanging on her wall, "Blessed is the flexible, so they should not be bent out of shape." PA's Governor allows work to get done between 6 am to 6 pm, so parents helping their child with distance learning can accomplish this and get their job done.

   Be approachable:

   ☐ Block out time on your calendar each day so employees can make appointments with you or reach out to you. Having office hours that you try and keep open so staff can pop in when needed.

   ☐ Let the staff know the best ways to reach you-IM, texting, email, what's your jam?

   Be observant- watch for signs of distress in employees:

   ☐ Create a safe environment so your team can tell you about situations that may be impacting their work.

   ☐ When responding to staff calls or emails, NC Blind is having sups/managers ask, "how are you feeling today? They then follow up as needed.

   ☐ Don't forget about your employee assistance program and promoting that service to employees in need.

☐ Trust your instincts if you see or sense something might be wrong. Make time to follow up and ask about it.

Be diligent:

☐ We know time is the most precious commodity right now, and that is why we are sharing these tips because they are not new or innovative - but they are proven to work, and in the end, will save you time.

Be silo-free- keep in contact with other departments that may impact your staff:

☐ Working remotely adds additional barriers that were not present in the office. If there was an issue with XYZ group, you could walk down the hall to that department to sort it out. You can help your staff overcome obstacles by getting barriers out of the way and staying in communication with the other departments, divisions, work units, etc. This goes back to intentionality. You have to work on this. It may include carving out time for a quick coffee conversation with the HR director every other week or having regularly scheduled calls with IT. These may already exist due to COVID, but how you bring issues your staff share is essential.

Be supportive and supported:

☐ Continuously encourage staff to get together with each other (we will say this in several sections to hammer home this point). A lot is lost when you are no longer together in meeting the social needs of staff.

☐ Be part of a support network-Surround yourself with other supervisors/managers so you can support each other and bounce issues or ideas off.

2. **Mental and Emotional Health Matters for You and Your Staff.**

   Remember- it starts with you! You should be showing your staff the importance of maintaining their mental health through self-care. To do this:

Create a distraction-free workspace:

☐ Try not to have that workspace also be your bedroom. It is tougher to separate work from downtime when it is right there. It may make it difficult for you to sleep.

☐ Also, try to use spaces that are not associated with your leisure time--couch, etc.   Even dedicating a particular work surface can help
   - Maybe you are on the couch, or now you have been sitting for a year on that same hard kitchen chair-You have to be extra careful about your posture
     - Use a rolled-up towel to help with lumbar support.
     - Put a pillow under your seat on a regular chair

☐ Some people have converted a closet, and you close the doors at the end of the day.

☐ Look around your environment to see what you can do to carve out a space that you can walk away from at the end of the day. Even using a screen room divider can give the illusion of a separate space

- ☐ Get ideas from others in the agency on what they have done to set up a workspace that works and share them with staff.
- ☐ Communicate your expectations with anyone that will be home with you. Just because you're working from home does not mean you're home in the traditional sense.

Establish a routine and stick to it- be realistic:

- ☐ Get up, shower, and change your clothes.
- ☐ Eat breakfast
- ☐ You can also prep your food for the day (even do it the night before), pack snacks, pack your lunch just as you would if you were going to the office. It will recharge you to do better work when you have good nutrition.
- ☐ Include some break times in the day for a stretch. Our friends in Arizona sent us the link, which is in the back under resources. https://www.healthline.com/health/deskercise#arms. Connect with a coworker over a zoom coffee break or lunch. Use breaks to get away from your desk or workspace.
- ☐ Make sure to have blank space on your calendar to handle situations that come up.
- ☐ Include transition rituals from the start of your day to the end of your day.
  - o For example, you can replace your commute time with taking a walk, listening to a podcast or audiobooks for thirty minutes, meditating, or creating some other exercise ritual. Or you can quite literally sit in your car and listen to music, or books, phone a friend to replicate that commute time.
  - o You can end the day by straightening up your workspace and making a list of the three things you want to accomplish the next day.
  - o Close your laptop and shut down the computer for the day.

Set expectations for what you want to accomplish each day:

- ☐ Use a checklist and get satisfaction in checking them off.
- ☐ Your motivation level can change throughout the day--figure out your ebbs and flows, capitalize on your most productive periods to tackle the more complex tasks, and do more manageable tasks when you have that lull.
- ☐ Music can also be a motivator and help you tackle the tough stuff. Match your music to the task at hand!
- ☐ You can also use your laundry as a work timer. You are going to start and finish something before changing the load from washer to dryer.

Turn off alerts on your cell phone so you aren't distracted by every alert.

- ☐ Log out of all your social media accounts during the workday. It will prevent you from getting distracted by all the tweets, likes, etc.

Use noise-canceling headphones if you have a lot of people around also working.

Set times to respond to emails, so you are not continually responding and interrupting the work you are trying to complete:

☐ You can section out your day, and this is maybe one of the tasks you tackle when you are in a lull period, as we mentioned above, or it is in your productive period, and you bang those out.

Set up office hours and stick to them

☐ Remember, if staff see you always responding at two in the morning or late in the evening, they may feel you expect them to do that too.

☐ For staff that is not exempt, this is extremely critical, and you want to work with HR to ensure you are following the FLSA.

Check-in with colleagues-it can be isolating working remotely, and you lose that sense of community.

☐ For you, it can be talking with other supervisors/managers to see how they are doing and what is working for them. For your staff, it is having them connect with the team.

If you are struggling, reach out and ask for help, and the same goes for the staff

☐ Remind everyone about your employee assistance program.

☐ Every state told us you could never say this enough. You may think you mentioned it a few months ago at a staff meeting, but people are at different places at different times, and having that reminder might be the spark they need to get some outside help.

Set up your support network (including Tech Support).

3. **Think "3"- the Management Trilogy.**

   There are three primary focuses for supervisors and managers. First, it is important to have accountability for both your program and your team. Second, it is important to manage performance and maintain compliance with policy and procedures. Third, communication is essential to support staff.

4. **Reset Expectations.**

   Don't assume that the exact expectations will transition from working in the office to working remotely. Be sure to reset the expectations and hold people accountable. Communicating expectations helps staff to understand their roles and responsibilities. Be sure to emphasize the continued focus on the consumer. Accountability for staff can take place through the creation of professional development goals and work plans. Be sure these are updated to reflect the revised expectations. You may need to delegate or assign projects to staff expressly. When this is done, be sure not to micromanage, but be clear with your expectations and schedule check-ins. Virtual collaboration tools may be helpful to use for group projects.

   ☐ **Orientation of staff**

- o Lots of hiring happening during the pandemic-
- o Help to connect them with their colleagues and set up 30-minute zoom meetings to meet everyone on the team.

☐ **Help staff understand their role**
- o You may want to look at things like expected response time for communications, or attendance at virtual meetings (having cameras on, for instance)
  - ▪ Establish expectations around after-hours work emails and texts (side bonus this will help with maintaining a healthy work-life balance.
- o Emphasize the consumer's continued focus- Even though VR is remote, we don't want to forget our consumers in the mix.
  - ▪ Help staff if they are uncomfortable with the outreach and meetings with consumers over zoom and coach them

☐ **Setting annual goals**
- o Now more than ever, staff can feel disconnected from the Organization and the work. It is easy to lose sight of the bigger picture and the agency and staff's goals.
- o Focusing on goals will help everyone to see their piece and how they are contributing to the greater Organization.
- o Tie them to the Common Performance Measures and expectations for the VR program
- o Have staff look at their caseloads and help to determine targets based on the clientele they serve mutually.
- o Other staff can set goals that match with their division's type of contributions to VR- overall work: business consultants, fiscal, etc.

☐ **Creating professional development goals/plans**
- o You want to focus on continued growth and development
- o Webinars, reading articles, or books, growth--This is the perfect opportunity for many virtual conferences. Staff can participate in things that may not have been possible a year ago with travel costs etc.

☐ **Review/revise work plans**
- o Have staff map out their plans for the week and month
  - ▪ This could include the number of intakes that will be performed, eligibility determinations, plans developed, annual reviews completed, updates on client progress, and closed cases. The key is for you and the counselor to plan for the time period and then monitor progress on achieving the outcomes for that plan, not on whether the counselor is online 8 hours a day. This will require you to be familiar with each counselor's caseload needs and demands--but it ensures close and clear communication of expectations.
  - ▪ For staff that is not counselors apply this same thinking. What items need to be accomplished this week, contracts to process, bills to pay, etc.

☐ **Delegate-Assign projects**

- o Be clear in your expectations when you delegate, and remember not to micromanage how the work is done.
    - ▪ You can set things like due dates and expectations for check-ins
- o Use virtual collaboration tools-there are dozens of products out there, including Microsoft products.
- o Set up systems so there is collaboration on projects and ways for people to work together
    - ▪ Texas Microsoft TEAMS has been essential to its ability to work remotely and maintain staff engagement. They started using it just for meetings and quick information exchange via chat but are increasingly using the TEAMS channels to create communication and information exchange structures for regions, units and teams. Some units have created very organized file structures on TEAMS to allow for quick access to commonly used files and reference materials and manage version control since staff can update a document there instead of circulating it by email. They also use it for informal, team building, and staff recognition activities.
    - ▪ Texas also used Microsoft Planner to create Work in Process boards (WIP), so teams can collaborate on joint projects. The WIP boards have given counselors and rehabilitation assistants a great way to work together to manage their caseloads.

5. **Performance-Plan for the Plan.**
Create a new plan for evaluating performance in the remote workplace. Start with good Organization and planning. This may include using shared calendars—schedule regular check-ins with staff to communicate about performance. Evaluate the individualized professional development plans with staff and communicate honestly when staff is underperforming. Annual performance reviews should not be a surprise if you give consistent feedback to staff throughout the year. Be sure your staff has what they need to succeed in their jobs (i.e., working computer, printer, and headset).

Start with good Organization and planning -
☐ Many agencies are relying heavily on the use of Shared calendars -
- o Updated at least weekly
- o Details about appts (while maintaining confidentiality)
- o Create space and expectations on that calendar, so staff have time carved out where no meetings are scheduled
    - ▪ Texas blocks out Friday afternoons where no internal meetings are scheduled, and Arizona reserves Fridays for one on one meetings.
    - ▪ They are also scheduling meetings, so people have a chance to use the restroom or get coffee--50 minutes instead of an hour.
    - ▪ Agencies use Microsoft Stream to create and post quick 'how to' videos in their TEAMS channels. This helps build staff capacity for using these new tools and gives step-by-step guides on how to perform some of the business processes implemented during COVID.

- You want to make sure you are using state/agency-approved technology and apps---Don't go rogue.

Regular check-ins

☐ Do what you say you will do and be consistent. You want to make the check-ins a priority and avoid canceling.

☐ Have staff set up a plan for the week and then check back in the next week to see what was accomplished.

☐ If you have a well-liked employee that is underperforming, don't let it slide. This circles back to secret two on emotional and mental health. Talk to them, find out what is happening, and give candid feedback to help them improve

☐ Watch out for over sharing---Sometimes, supervisors get a feeling of freeness when on a video versus being in person. You don't want to share things with the staff you would not do in person.

Evaluate individualized professional development plans

☐ Evaluate the professional development plan we talked about earlier.

☐ With training going virtual, it has been easier and cheaper to offer staff opportunities to grow and learn. Nurture that and foster that. Creating that culture of learning is a great gift to have. The VRTAC-QM will have a collection of learning resources for supervisors and managers when the website goes live.

☐ It is also essential to invest some time in yourself to learn new ideas, approaches, and thoughts.

Annual performance reviews (no surprises)

☐ Your diligence, connecting, and keeping track of what is happening with each of your staff will help you as you do your virtual performance reviews. You want to make sure you are giving feedback the whole way along, so there are no surprises for staff in a review. Someone may think they were doing fine while you were quietly upset with the quality of their work.
   o Review their progress on the annual goals they set.

Tools go two ways

☐ Make sure staff have the tools they need to get the work done

☐ Some of you had put in temporary solutions as the pandemic started, but as this is getting to be a more prolonged situation and, in some cases, the new normal, you want to rethink how all this is working for staff. Some of this may be out of your control due to internal processes, but your role is to advocate and bust down barriers.

☐ Working computer, headset, printer, etc.
   o Work out things like how documents should be mailed, send them stamps, envelopes, paper, or is everything electronic.
   o Do staff have supplies like sticky notes, note pads, paper, and pencils?
   o Can they take their work chair home for good ergonomics?
   o Tech support- you may have to help facilitate this. As your team comes up with good tech tips, they can also serve as a resource to each other. You can regularly talk about that and even add it to your meeting agenda.

- o Bottom line--you want to set up your people for success. If you are not, you are going to hear all of this as you evaluate performance.

☐ **Tools to track that work is getting done**
Focus on outcomes, not just activities (circling back to those goals you set above--check-in on how last week looked and what happened)

Think about evaluating productivity and specifically how to move away from more time-based approaches to something more meaningful regarding outcomes. Purely time-based approaches mistake presence for productivity. I had a boss call in Butts in the seat--this doesn't mean work is getting done. Of course, this has always been a challenge, but I think it has been magnified during remote work. Agencies reported some managers are asking their staff for time logs, daily check-in and checkout emails, requiring an unrealistic response time to non-urgent emails. Show trust to those you hire until there is a reason not to trust them.

- o Consider looking at the quality of the work versus quantity.
  - ▪ Not all caseloads are equal--sometimes, working with a specialty population can pose additional challenges. Maybe they are working with an incredibly challenging group of customers and their families. Are they navigating these situations well and coming to a successful resolution of issues?
  - ▪ Quality of the casework is marginal and just getting by, or is there real thought put into case notes and plans?
- o What do the QA reviews report?
  - ▪ Customer satisfaction surveys--are you receiving many customer complaints that they cannot get ahold of staff or aren't getting responses? Or are customers reporting excellent experiences.
  - ▪ Are customers getting employment?
  - ▪ Have staff facilitated training being accomplished remotely for customers?
  - ▪ Have staff navigated working with vendors more creatively?
  - ▪ Have staff created their own virtual training options when a vended option isn't available. Example: NC Blind counselors are creating virtual Pre-ETS newsletters and at-home training.
  - ▪ Are staff taking the initiative and bringing up problems and suggestions on how they would like to solve them?
  - ▪ Ask staff to evaluate themselves
  - ▪ Provide Positive feedback and celebrate the wins.
- o You can also look at more traditional methods for evaluating work.
  - ▪ Use case management system--history of casework
  - ▪ Ask IT to help you develop reports or utilize reports already in your case management system
  - ▪ Case review for indicators of client engagement
  - ▪ Frequency of contact with clients
  - ▪ Case notes that provide details on engagement with clients

- ▪ IPE (last reviewed and services)
- ▪ Last services authorized

Bottom line, connecting with staff will help you keep up to date and in the know on what is happening so you can do a proper evaluation

6. **Communication! Communication! Communication!**

   Communication is vital to successful remote supervision. As previously mentioned, it is essential to have consistent communication with staff through regular check-ins. You should know what is going on in the agency. You should be discussing workloads, identifying and solving problems, and providing feedback and support.

   ☐ **Discuss what is happening with the agency**
   - o Arizona does fun-themed emails-Motivational Monday, Winning Wednesday, and Fun Fact Friday--rotate different people in the leadership group to send these--it gives a glimpse into the various leaders' perspectives and personalities.
   - o Both Minnesota agencies have done YouTube videos with a message that can go out to all staff.
   - o Keep people in the loop. Even more critical as folks don't have all the informal methods of keeping up on what is happening when they were all in the office.
     - ▪ Err on the side of over-communication
     - ▪ Idaho General is doing a fun newsletter that has nothing to do with work topics but includes self-care tips, recipes, etc.

   ☐ **Weekly check-ins with team members (create new routines as social needs won't be fulfilled)**
   - o Do both Individual and whole team (encourage people to use their cameras)
   - o Weekly team meetings- have staff help set the agenda versus you making a laundry list of items to cover
     - ▪ Play music, have a funny screensaver, or document when people join the virtual meeting.
     - ▪ Virtual office party-send a care package ahead of time
     - ▪ Virtual Costume contest, having everyone wear a particular color or the ugly sweater day.
     - ▪ Start the meeting with a little fun and a quick icebreaker—
     - ▪ [10 Fun Virtual Icebreakers to Take Remote Working to the Next Level](#)
     - ▪ Maybe a couple of weekly trivia questions (pop culture, current events) or have everyone share one bucket list item they have, show and tell one thing in your immediate workspace, or have everyone show their pet. You could also rotate meeting hosts and develop their own personalized "check-in" exercises. This could be mentioning upcoming birthdays, doing a breathing exercise, or having people share a quarantine hobby. Do a zoom poll with a funny question.
     - ▪ Add tech tips to the agenda.

trainvr.org | **vrtac-qm.org**

- Communication is a two-way street - listening is more important than responding
- How much time do you spend listening versus talking?
- Are you listening to respond or to understand

☐ **Setting the tone for the week (what do your staff hope to accomplish)**
  o This includes key tasks and milestones-which, in turn, can help with evaluating performance

☐ **Realize you have introverts and extroverts.**
Ensure all voices are heard by circling back with staff via email and asking what might have been missed in the discussion?
  o Introverts generally require more time to process ideas overall and are more likely to speak up in an email or one on one exchange. By giving space, you will get insights you wouldn't have gained in the meeting and reduce overall cultural groupthink. Know your people so you can do what will make them most comfortable (one-on-one call after the meeting, etc.) This helps with respect.

☐ **Foster Collaboration**
  o Encourage staff to meet regularly as a cohort
  o Ideas from the field
    - Schedule coffee dates with a coworker or a lunch conversation.
    - Do an online group fitness
    - Water cooler--you can set up virtual chats in Microsoft teams similar to being around the water cooler or coffee pot back at the office.
      - Florida General--**Water cooler moments.** Water cooler moments are opportunities to talk about something we're all interested in or have in common. In the past, it used to be something newsworthy or a television show we'd all seen. Now you can create these moments by creating a new team in Microsoft Teams entitled virtual water cooler. You can encourage your staff to check in frequently and regularly to share and talk about non-work-related items like a funny story about your kid, the new RV you're planning to purchase, or even a great show you've been watching on Netflix.
    - Agencies have also set up a coffee break time where folks can float in and out to chat on Teams.
      - Crowdsourcing- It is an excellent way to address challenges and allows you to bring together large groups of remote working people around a single project. You can use internal crowdsourcing to perfect your remote work processes
        - **Michigan example:** Crowdsourcing: An Innovation Tool to Overcome the Limits of Remote Work

☐ **Talk about workloads, deadlines, and balancing projects**

  o **Identify and solve problems**

- It can be easy to have misunderstandings on Zoom calls and other virtual meetings (internet glitches, your attention drifts)
  - Do this yourself and encourage staff to assume positive intent--if something doesn't make sense start with the assumption their intention was reasonable and helpful--pick up the phone or have a zoom to discuss.
  - Help get barriers out of the way for staff.

☐ **Give timely feedback and genuine appreciation for work completed**
  - o Don't forget gratitude and celebrating the wins
  - o Be very specific about the appreciation you show- Give an example. Instead of saying thanks for all you do, you could say, "great job on handling that very tricky meeting last week with Pete and his family; you did a great job navigating their misunderstandings and came to a successful resolution."

☐ **Coach and support-- repeat**
  - o Each of the tips requires time, attention, and consistency

7. **Boss Does Not = Having all the Answers.**

   Just because you are the boss does not mean that you are responsible for having all the answers. You are allowed to say: "I don't know." When you don't have the solution to a problem, ask others to share their thoughts and experiences, and remember that there are no solutions to some problems.

   I don't know are powerful words
   ☐ Pretending to know when you don't know can cause a whole host of problems. You can later find out an answer you gave was wrong or hide the correct answer to save face. This can be stressful, lonely, and is draining.
   ☐ It is okay to let go of your need to have all the answers.
   ☐ Letting go is empowering and gives room to do the next thing
   Research has shown that expressing vulnerability and asking for help is a strong signal to others that you are trusting, and you are more likely to be trusted in return.   It puts you on the path to solving problems and sparking innovative thinking

   Ask people to share insights, opinions, and experiences.
   ☐ People will feel valued
   ☐ You build camaraderie, teamwork and collaboration
   ☐ This shows respect and trust.

   Sometimes, there are no good solutions
   ☐ Sometimes there is no right answer---you are making the best of a tricky situation. Getting that input from others will help you all address it.

   You are not in this alone!

☐ Don't forget to reach out to your colleagues, you can reach out to us if you are stuck or trying to find new ideas. Don't carry the weight of the world alone.

Resources:

CIT-VR website

- https://trainVR.org

VRTAC-QM website

- https://vrtac-qm.org/

Video: Working from Home vs. Working at the Office | Iris (From Secret #2)

- https://www.youtube.com/watch?v=lvDm17QvlFw

Establish a routine and stick to it (including setting break times during the day (From Secret #2)

- https://www.healthline.com/health/deskercise#arms

Video: Conference Call in Real Life (From Secret #6)

- https://www.youtube.com/watch?v=JMOOG7rWTPg

10 Fun Virtual Icebreakers (From Secret #6)

- https://productcoalition.com/10-fun-virtual-icebreakers-to-take-remote-working-to-the-next-level-d764122e2e14

The Center for Rehabilitation Counseling Research & Education
NVA Graduate Academic Centers
1925 Ballenger Avenue, Suite 250zz
Alexandria, VA 22314

trainvr.org | **vrtac-qm.org**