



Virtual Casework and the Transition to a Remote Workforce

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Which partner do you best represent?





Virtual Casework and the Transition to a Remote Workforce

- Illinois WIOA Professional Development via the WIOA Professional Development Committee
- Joe Raymond, Director of Social Policy and Human Service Programs, ICF: joe.Raymond@icf.com 571-420-3097
- Beth Heinen, Ph.D., Director, Human Capital, ICF, 1-703-272-0013 beth.heinen@icf.com
- Gerrie Cotter, Comprehensive Case Management and Employment Program (CCMEP) Project Manager, Ohio Department of Job and Family Services: Gerrie.Cotter@jfs.ohio.gov, 614-466-8197



Today's Agenda: Virtual Casework and the Transition to a Remote Workforce

- **Overview:** Kiersten Baer, Online Marketing Coordinator| Illinois Center for Specialized Professional Support
- Promising Practices, Tips, and Strategies: Beth Heinen
- Tele-Medicine: Organizational Change: Joe Raymond
- Virtual Human Service Delivery: Gerrie Cotter
- Management, Staff, Partner Considerations Discussion



Promising Practices, Tips, and Strategies for Working Remotely

Beth A. Heinen, Ph.D.
Director, Human Capital
ICF

How to Manage in a Distributed Work Environment for Extended Periods

Communicate

- Keep your team informed
- Provide consistent guidance
- Consider hosting daily check-in calls
- Provide guidance in emails/intranet page
- Provide clear expectations on how to work “do’s and don’ts”

Use Technology

- Establish collaboration tools
- Allow room and time to learn
- Practice, practice, practice

Manage

- Manage by results
- Stay connected individually and as a team
- Be flexible – this isn’t “one-size-fits-all” for everyone
- Show support
- Ask for feedback

Best practices in sustaining teleworking – barriers your team will encounter and possible solutions

Communication Cadence

- Start with top leadership and establish a cadence of communications (email, video, etc.)
- Managers to communicate often with teams
- Discuss challenges and solutions openly
- Be open about expectations
- Make sure emergency contact information is up-to-date

Technology Glitches

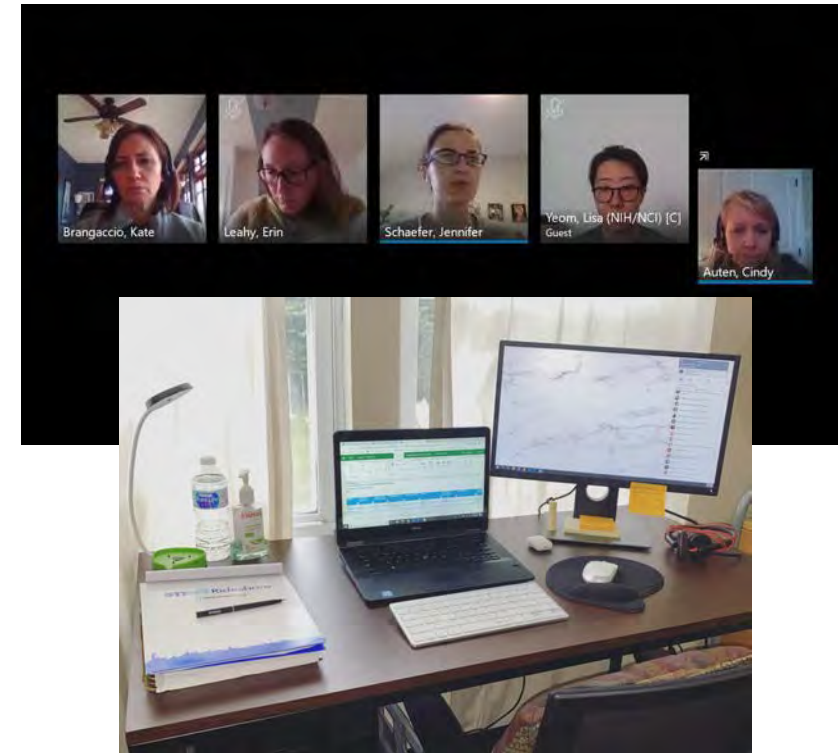
- Communicate when system is down
- Offer help desk support; ways to navigate around challenges
- Backup plans for broadband, access to files, and how to communicate

Longer Term Isolation

- Be mindful
- Address disruptions
- Stay connected, create face-to-face connections
- Set up dedicated space
- Encourage a daily routine
- Take the extra time to talk to people

How to maximize engagement in a telework environment: creating interactive online meetings and exchanges

- Before:
 - Set an agenda and send out ahead of meeting
 - Test technology and send out instructions
- During:
 - Introduce everyone
 - Allow a minute (or a few) to connect personally
 - Offer polling/chat functions
 - Assign a facilitator and notetaker
 - Use video to connect
 - Open it up for conversations; call on specific people
 - Ask open-ended questions
 - Avoid multi-tasking/stay focused
 - Use the mute button (to avoid background noises and echoes)
- After:
 - Follow up with notes and action items



Tips and tricks for a successful teleworking environment

Communicate

- Establish expectations with your manager
- Define regular work hours, check-in times, and tasks

Routine

- Segment - Focus on work during work time
- Defined start and end times to work day/periods

Home Office Space

- Set up a secure, dedicated telework area in your home to separation between work and home life

Home Technology

- Check your internet speed at home
- Consider upgrading to higher-speed internet access

Stay Connected

- Check if your company already has a remote infrastructure
- Use collaboration tools to stay connected

Don't Sit Too Long

- Make sure to take a break, stretch, and eat lunch

Telework Tools

Virtual Communication Tools



Google Hangout



Zoom



Skype



WhatsApp



Slack

Meeting Collaboration Tools



Miro



IdeaBoardz



Mural

File Sharing Tools



OneDrive

OneDrive



Google Drive



Dropbox

Questions/Discussion





Tele-Medicine: Organizational Change

Joe Raymond

Director, Social Policy and Human Service Programs, ICF

Tele-Medicine Remote Services Research: Laureen Supplee Summary

Telehealth Strengths

- Impact found to be same or better than in-person
- May be more cost effective for some communities (veterans, remote families, Tribal)
- Reduced travel time, reduced child-care costs without decrease in quality; reduced barriers to services for parenting support

Telehealth Challenges

- Crowded homes: lack of quiet space to engage in virtual home visits:
Confidentiality
- Tele-behavioral health (VA) found therapists noting not being able to see physical markers of stress
- Less is known about effective means of building rapport, coaching strategies, or effective means for conveying information: therapists reported still being able to build rapport with clients



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Fundamentals of Organizational Change



What is Organizational Change?

- A collective term for all approaches to prepare, support, and help individuals, teams and organizations in making organizational change



Core Principles

- Change is a long – term process
- People make change happen
- There needs to be an IMPERATIVE
- People must be held accountable
- Reactions to change will include both welcoming and resistant behavior
- Involvement of relevant stakeholders leads to commitment
- Meaningful change can mean re-defined mission/new outcomes/new processes/consolidation/integration
- Be clear that key decisions will be made by formal leaders, but meaningful input is authentically desired

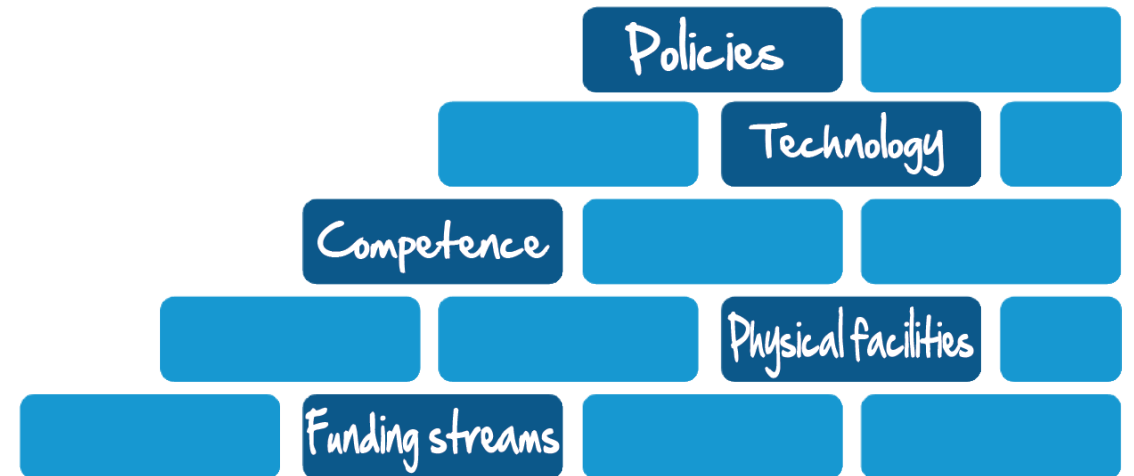
People Resistance is Normal

- Fear of loss of control
- Genuine uncertainty
- Need for familiarity
- New expectations may mean new work
- Concern for competence (can I do this?)
- Needing time to adjust
- Turf, power, organizational control, etc.



Structural Barriers

- Policies
- Organizational culture
- Funding streams
- Physical facilities
- Competence
- Technology
- The lack of an imperative



General Strategies

- Involve stakeholders
- Frequently communicate the vision
- Divide planning and implementation into manageable, easy steps
- Let commitment grow over time
- Reward progress, do not expect perfection
- Make available extra resources (e.g., time)
- Celebrate then bury the past with honor... then build excitement about future

Strategies for Leaders

- Visible leadership
- Define the imperfect present and the more perfect future
- On-going communication (memos, videos, meetings, social media, etc.)
- Listen, listen, listen
- Show your personal willingness to change
- Identify change ambassadors
- Set inclusive planning and process expectations
- Be clear that change is non-negotiable (Daryl Conner’s “Burning Platform”)
- How it is done is an inclusionary conversation/process: all input will be authentically considered
- Align outcomes with all relevant means

Organizational Change in a Virtual Setting

- The same principles apply
- It is both easier and more difficult
- Crisis can drive real change
- Experiment and reward failure
- Capture lessons learned
- Ask others how they did it





Examples of Effective Organizational Change

- Baltimore Harbor: Governor William Donald Schaffer
- *It's Our Ship*: Michael Abrashoff
- Department of Public Health – Department of Social Services Consolidation
- Georgia and Kid's Count
- Change in Leadership
- Change in Technology





Virtual human service delivery: how can we succeed?

Gerrie Cotter, Ohio Dept. of Job
& Family Services



Challenges: Workforce

- Transitioning to remote work
- Converting in-person trainings to virtual
- Technical Assistance



Challenges: Clients



NEW FLEXIBILITY



ACCEPTING NEW CASES
VIRTUALLY



CONTINUING TO ENGAGE
CURRENT CLIENTS

Issues for Federal Human Services

- Anticipating flexibility needed
- Gathering feedback from states
- Releasing guidance quickly
- Helping locals leverage online technologies

Issues for Federal Human Services

- High unemployment
- Work Participation
- Limited Childcare
- Protecting human service workers
- Making flexibility and virtual new normal

Virtual instead of in-person training: Considerations for Success

- Internet
- Equipment
- Home situation
- Motivation
- Progress
- Support



Virtual instead of in-person: Considerations for Success

Check-in

survey

Down the Road...







Virtual Casework and the Transition to a Remote Workforce: Panel Discussion

- Management Considerations
- Staff Considerations
- Customer Considerations
- Partner Considerations

Virtual Casework and the Transition to a Remote Workforce: Management Considerations

- What are the top considerations or priorities about transitioning to a remote workforce?
- How has service delivery changed? What challenges are being addressed? What opportunities have been identified?
- How can productivity be maintained during this time of change?
- Remote Supervision: What challenges have emerged? How are these challenges being addressed?
- How are you measuring success in a remote environment?
- What type of technology tools are being used for remote work?



Virtual Casework and the Transition to a Remote Workforce: Staff Considerations

- What measures can be taken to ensure the safety of staff?
- What is being done to maintain or develop teams?
- How is your agency supporting staff with managing stressors of work, home, etc. during this crisis?
- How can management promote and support a healthy work-life balance?
- What legal or human resources issues have to be addressed?
- How are agencies supporting staff in their ongoing training needs?
- What are the most pressing technology barriers? How did you overcome them? What supports are in place for staff with less technology sophistication?
- How are agencies engaging staff in strategy development for the transition to at-home work and the eventual return to office settings?



Virtual Casework and the Transition to a Remote Workforce : Customer and Partner Considerations

Participants/Customers

- What has changed for program customers?
- What challenges are being faced? How are the challenges being addressed?
- What positives have been identified from this situation that can be maintained over time?

Partners

- How have partners been impacted?
- What challenges are being addressed?
- What opportunities are emerging for collaboration?

Questions and Discussion

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