THE NEW NORMAL: STRATEGIC PLANNING WITH REMOTE TEAMS

RESOURCE GUIDE
GBA/GIP VIRTUAL PROGRAMMING | 11.5.2021

Table of Contents

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KOTTER'S CHANGE MODEL

The model used for strategic planning discussed in this session is a modified version of Kotter's 8-step process for leading change. The model, in its entirety, can be found here: https://www.kotterinc.com/8-steps-process-for-leading-change/.

CONSIDERATIONS FOR STRATEGIC PLANNING WITH REMOTE TEAMS

Team Setup & Strategic Planning Kick Off

1. Identify a project sponsor, a senior leader to serve as a champion/advisor for the strategic planning effort. Meet with the sponsor to develop a vision for the strategic planning effort.
2. Identify strategic planning team members with varying perspectives and areas of expertise. Have your sponsor invite them to join the team with a call to action.
3. Identify a meeting note taker, someone who is not a team member, to support all strategic planning meetings.
4. Hold a virtual kick-off meeting to share the vision, goal and objectives as well as recommendations for the team setup and path ahead.
   A. Prior to the meeting:
      i. Develop recommendations for tools and strategies to best support your team's online collaboration. Consider:
         a. Existing tools offered by your place of employment and budget if new tools are required
         b. What the learning curve may be for those using new software, and how to address it
         c. How you will meet (e.g., virtual conferencing platform) and frequency of meetings
         d. Where you'll 'chat' or hold online conversations
         e. When and how email will be used
         f. Where you'll store files that all can access
         g. Where you'll build and store your project plan and timeline, and track responsibilities and tasks
      ii. Prepare an overall goal and objectives (no more than 6) to support the vision.
   B. During the meeting:
      i. Discuss the vision, goal and objectives with the team and modify if necessary.
      ii. Identify deliverables associated with each objective.
      iii. Confirm how the team plans to collaborate.

Project Planning

1. Discuss with your sponsor a reasonable deadline to complete all of the objectives you've defined.
2. Use the objectives and associated deliverables, as well as the deadline you've established, to guide the design of a project plan that will support your strategic planning efforts (see Example 1).
3. List all of the tasks required to reach each deliverable. Then assign a due date for the deliverable and go backwards in time to develop a timeline for its related tasks.
4. Based on their strengths and areas of expertise, separate your strategic planning team members into mini-teams by assigning them to handle the work associated with a specific objective. List names of each team member who will handle the tasks related to the objective. Select a team lead for each mini-team and make them responsible for the final deliverable.
5. Ensure all of the team members review and agree upon the project plan prior to implementation.

At Risk ⓘ	Task Name	Start Date	End Date	Lead ▽ ⓘ	Duration ⓘ	% Complete ⓘ
⚑	− Objective 3: Develop or adopt policies, procedures, guidelines and standards	04/17/20	06/03/20		34d	80%
⚑	Research academic and business settings for remote work best practices and trends	04/17/20	05/04/20	Dan/John	12d	99%
⚑	Research medical settings for telehealth best practices and trends	04/17/20	05/04/20	Matt/Renee	12d	99%
⚑	Collect USF/USF Health documentation on current policies, procedures, guidelines and standards	04/17/20	04/22/20	Lori/Jason	4d	75%
⚑	Compile list of recommended/adopted procedures, processes, guidelines and standards	05/04/20	05/08/20	Dan	5d	35%
⚑	Review and discuss research findings, proposed procedures, guidelines and standards	05/11/20	05/11/20	Dan	1d	25%
⚑	Presentation of research findings	05/26/20	05/26/20	Jacki	1d	0%
⚑	DELIVERABLE: Recommended best practices, procedures, guidelines and standards	06/03/20	06/03/20	Dan	1d	0%
⚑	− Objective 4: Recommend a program implementation plan	04/17/20	07/08/20		59d	59%
⚑	Review workforce and environmental analysis, research on other institutions, and proposed procedures, guidelines and standards - prepare to bring recommendations to 5/29 meeting	05/26/20	05/28/20	All	3d	99%
⚑	Remote work recommendations	04/17/20	05/29/20	Don	31d	75%
⚑	Telehealth recommendations	04/17/20	05/29/20	Renee	31d	50%
⚑	Recommendations for operational efficiency and workforce productivity	04/17/20	05/29/20	Renee/Don	31d	50%
⚑	− Presentation to leadership and modification of plan	07/08/20	07/08/20	All	1d	0%
⚑	DELIVERABLE: Program implementation plan	07/08/20	07/08/20	Jacki	1d	0%

Example 1: Project Plan organized by objectives.

Staying on Track

1. Develop a communication plan/calendar that will assist you in scheduling meetings with your team members and in sharing information with stakeholders impacted by your strategic planning efforts. Meetings to schedule (schedule as soon as possible to avoid issues with calendar conflicts):
    a. Weekly, 15-minute check-ins with each mini-team to discuss project status. This is key to staying on track.
    b. Monthly, 1-hour meetings with your entire strategic planning team (and your sponsor) to obtain feedback on deliverables.
    c. Depending on the length of your project plan, several meetings (e.g., every three months) to brief senior leadership on progress and obtain approval and feedback on your work.
    d. Get on the agendas (15 minutes) of existing stakeholder meetings to brief them on the progress and keep them informed on how your work will make their lives easier.
2. Select a task tracking tool that is accessible by all of your team members and allows them to update items on their own. Use this to review status in your 15-minute mini-team check in meetings.
3. Be prepared to adapt and change. Unexpected things will happen.

ONLINE TOOLS FOR COLLABORATION, PROJECT & TASK MANAGEMENT, AND EVALUATION

Recommended Tools

1. Microsoft Teams   https://www.microsoft.com/en-us/microsoft-teams/group-chat-software
2. Teamwork   https://www.teamwork.com/
3. Monday.com   https://monday.com/
4. Slack   https://slack.com/
5. Zoom   https://zoom.us/
6. Trello   https://trello.com/
7. Microsoft Planner   https://tasks.office.com/
8. Smartsheet   https://www.smartsheet.com/
9. Box   https://www.box.com/
10. Google Docs   https://www.google.com/docs/about/
11. Qualtrics   https://www.qualtrics.com/

REMOTE WORK SURVEY QUESTIONS

For Managers
Remote Work Experience Survey
(Administered via Qualtrics)

This 10-question survey is geared toward leaders of (organization name) employees who are working remotely during the COVID-19 pandemic. The purpose of the survey is to collect feedback on your unit's experience with remote work. Your responses will be held confidential and used solely for future planning. Thank you for your participation.

1. Are you managing staff who work remotely?
   a. Yes
   b. No (this redirects to a message stating the survey is only for those managing remote workers)

2. Which mission area does your unit largely support? (Check more than one if applicable.) (checkboxes)
   a. Education
   b. Clinical
   c. Research

3. How would you rate your current experience managing staff who work remotely?
   Scale:
   5 – Excellent
   4 – Very Good
   3 – Good
   2 – Fair
   1 – Poor

4. What challenges have you and your staff encountered while working remotely? (Choose all that apply.) (checkboxes)
   a. Difficulty collaborating and/or communicating
   b. Impact on mental health
   c. Distractions at home
   d. Time management
   e. Staying motivated
   f. Lack of adequate technology and/or reliable Wi-Fi
   g. Other (please explain)

5. How would you rate the productivity of remote staff compared to their productivity in the office/clinical environment?
   Scale:
   5 – Much more productive
   4 – More productive
   3 – Equally productive
   2 – Slightly less productive
   1 – Much less productive

6. How would you rate the quality of work produced by remote staff compared to their quality of work in the office/clinical environment?
   Scale:
   5 – Much better quality
   4 – Better quality
   3 – Equally as good quality
   2 – Slightly worse quality
   1 – Much worse quality

7. As a leader, how satisfied are you with the tools and resources provided by (organization name) to support remote work?
   Scale
   5 – Extremely satisfied
   4 – Very satisfied
   3 – Moderately satisfied
   2 – Slightly satisfied
   1 – Not at all satisfied

8. How can (organization name) improve the remote work experience for employees?
   (open response)

9. As you look toward the future of (organization name), how will you position your unit for modern ways of doing business? What are some changes you might make to increase productivity, streamline processes, and save costs?
   (open response)

10. Based on your experience with our new working conditions, what suggestions or lessons learned do you have for other (organization name) members?
    (open response)

For Employees
Remote Work Experience Survey
(Administered via Qualtrics)

This 10-question survey is geared toward all (organization name) employees who are working remotely during the COVID-19 pandemic. The purpose of the survey is to collect valuable feedback on your experience with remote work so that we can plan for a better future. Your responses will remain anonymous. Thank you for your participation.

1. Which mission area are you associated with? (Check more than one if applicable.)
    a. Education
    b. Clinical
    c. Research

2. How would you rate your current experience with remote work?
    Scale:
    1 – Excellent
    2 – Very Good
    3 – Good
    4 – Fair
    5 – Poor
    If response is Fair or Poor, will trigger the question 'How can (organization name) improve the remote work experience for employees?' (open response)

3. Is your home office adequately set up (equipment, supplies, furniture, Wi-Fi, etc.) to support your success while working from home?
    a. Fully set up for success
    b. Partially set up for success
    c. Not adequately set up for success
    If response is B or C, will trigger the question, 'What else do you need to ensure your success?' (Check all that apply.)

    a. Laptop
    b. Monitor(s)
    c. Better Wi-Fi
    d. Improved access to USF Health software/systems
    e. Comfortable desk, chair, or other office furniture
    f. Printer
    g. Scanner
    h. Fax capabilities
    i. Basic office supplies
    j. Other – fill in response

4. Do you believe you get more work done when working remotely?
    a. Yes
    b. No

5. Does your supervisor set clear goals that you can easily follow while working from home?
   a. Yes
   b. No

6. How do you receive feedback from your supervisor while working from home?
   a. Video conferencing
   b. Digital communication (text, email)
   c. Phone call
   d. I don't receive feedback from my supervisor

7. Are you happy with how you receive feedback from your supervisor?
   a. Yes
   b. No

8. Does working via Microsoft Teams (or other collaboration platform) provide sufficient interaction with your coworkers to allow a sense of camaraderie?
   a. Yes
   b. No
   If response is No, will trigger the question, "What methods do you recommend for fostering a sense of camaraderie for those working remotely?"

9. Would like more training and/or resources on remote work and collaboration tools?
   a. Yes
   b. No

10. When we return to the "new normal," do you want to continue working from home?
   a. Yes, full-time. I will come in only when necessary.
   b. Yes, part-time. I understand that I will share space when in the office.
   c. No. I prefer to work full time in an office or clinical space.

OPERATIONAL EFFICIENCY ACTION PLAN TEMPLATE

Department/Unit Plan for
Maximizing Operational Efficiency

Instructions: Please respond to the nine questions that follow to develop your operational efficiency action plan. Plans will be reviewed by the _____ Committee on a monthly basis.

1. Please list employees in your department who perform a supervisory/managerial role and the number of employees that report to them.

2. List staff you've identified who can work remotely (fully remote or hybrid) on a permanent basis.

3. How will you use existing equipment and furniture to support staff working from home (please be as specific as possible)? What is your plan for securing paper documents, files and any other physical items that should not be stored or taken off campus?

4. What challenges need to be addressed to ensure the success of those who will be working remotely?

5. What do you plan to do with the space that will be vacated by those working remotely?

6. Is your department paperless? If not, what is your plan to get there?

7. What other changes will you make to increase operational efficiency (e.g., staff reorganization, process improvement, automation, cost reduction, changes that promote sustainability)?

8. How do you plan to track and ultimately increase staff productivity?

9. Once your action plan is implemented, in what ways will you measure the success of your department?

OPERATIONAL EFFICIENCY ACTION PLAN FOLLOW-UP SURVEY

Operational Efficiency Action Plan Follow-Up Survey
(Administered via Qualtrics)

This brief survey is designed to follow up with department/unit leaders who submitted operational efficiency action plans (OEAP) to the _____ Committee. We thank you for the time and effort you put into your plans and hope to use your responses to gain an understanding of the progress you've made as well as any changes to your plan as time has passed. A copy of your OEAP has been provided to you and questions that follow include associated OEAP question numbers so you can easily refer back to the responses in your plan.

Thank you for your participation in this OEAP follow-up effort.

The _____ Committee

1. Name: (fill in)

2. Department: (fill in)

3. Post COVID, the employees in my department/unit who are currently working remotely will (OEAP, Q2):
   a. Return to their original, in-person office arrangements.
   b. Be permitted to continue remote work arrangements in some form (e.g., hybrid, fully remote).

4. Have your space plans changed from what you submitted in your OEAP (OEAP, Q5)?
   a. Yes – branch to 'Please explain'
   b. No

5. What is the most important thing you've done to increase operational efficiency (OEAP, Q7)? (fill in)

6. Have your methods to track and increase employee productivity been successful (OEAP, Q8)?
   a. Yes
   b. No – branch to 'Why not?'

7. Is there anything else you'd like to share with the _____ Committee? How might we continue to support your success and attainment of operational efficiency? (fill in)

RECOMMENDATIONS & BEST PRACTICES

Remote Work

1. Consider recruiting/hiring top-level candidates who will not be required to move to your area and can work remotely. Develop a process for hiring/paying out-of-state employees.
2. Update existing job descriptions to include the phrase 'ability to work remotely' where applicable.
3. Develop questions for interviewing potential employees who have the opportunity to work remotely.
4. Refine the approval process for remote work. Create tools to make it easy for managers to identify those who are best suited for remote work and set remote employees up for success. Examples:
   A. USF Health's Remote Work Eligibility Criteria Checklist for Leaders
   B. USF Health's Leadership Checklist for Telecommuting Preparation
5. Develop work-from-home manager and employee guides (to include best practices). Examples:
   A. USF Health's web page of existing and newly developed remote work resources for faculty and staff
   B. USF Health's remote work employee guide
   C. USF Health's recommended headsets and laptops for remote work
6. Define standard procedure for tracking inventory for those who use university-owned equipment at home.
7. Determine methods for assessing the remote employee experience and satisfaction following implementation of work from home program. Survey managers as well.
8. Develop parking plan/process for remote workers.
9. Develop a guide for leading remote meetings. Example: USF Health's Best Practices for Leading Microsoft Teams Meetings.
10. Develop a hoteling plan for remote workers who occasionally come to campus and create hoteling/shared spaces following best practices for design and reservation of space.
11. Determine how to use existing tools and systems to track productivity of remote workers. Showcase how others are using these tools to provide models that others can follow.
12. Develop procedures for remote employees to obtain their mail delivered to campus. Example: USF Health Mail Options for Remote Workers.

Telehealth

1. Develop a telehealth profitability plan.
2. Develop policies, procedures, guidelines and/or standards for telehealth.
3. Appoint a dedicated telehealth program manager.
4. Design a telehealth staff guide (best practices and use of technology).
5. Design and issue an employee telehealth experience survey.

Operational Efficiency

1. Conduct operational efficiency action planning with departments.
2. Minimize unnecessary meetings and switch face-to-face meetings to virtual wherever possible to reduce unproductive travel time.
3. Focus on continual process improvement to streamline services, processes, and resources. Schedule regular mapping and review of processes in order to remove barriers to success.
4. Introduce idea management by putting a mechanism in place for team members to share their new ideas and promote a culture of constant improvement.
5. Develop strong planning and forecasting capabilities to avoid (or minimize) the need for overtime work.
6. Renegotiate existing contracts and/or payments for services.
7. Combine forces with other departments/units to share in subscriptions and software licensing and consolidate technology tools.
8. Standardize office supply ordering and distribution.
9. Put a plan in place to reduce and/or reconfigure office space. Use best practices when designing shared/hoteling space.
10. Turn off and unplug computer and office equipment whenever possible to reduce energy.
11. Go paperless or set standards to limit printing and paper usage.
12. Switch off lights when leaving a room (or install motion sensors) and consider using natural light or eco-friendly lighting as often as possible.
13. Swap out single-use cups or water bottles and have employees bring their own reusable drink receptacles.
14. Limit heating and cooling through temperature control.
15. Launch a project management office.

Workforce Productivity

1. Assess and improve your organizational structure. Define and communicate roles and responsibilities for all staff members. Organize staff to ensure multiple people aren't performing the same tasks and cross train to ensure all staff members have a backup.
2. Develop standard performance management training and resources for managers.
3. Develop a flexible framework that managers can use to design their own productivity tracking/measurement plans for staff – and train on this framework.

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- American Telemedicine Association
- The Office for the Advancement of Telehealth (HRSA)
- National Telehealth Policy Resource Center
- Telework.gov -- official website of the Federal Government's telework program

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