Pajama Brigade: Being Virtual

TIPS & TRICKS FOR WORKING FROM HOME

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About SAIS

• Southern Association of Independent Schools
• Provide professional development + accreditation + surveys + career center + more
• K-12 private schools in the Southeast
• 384 member schools
• 9 staff members
• Went virtual in April 2016
• Based (or formerly based?) in ATL
• Current staff locations = 5 GA + 2 SC + 1 TN + 1 VA
Do you currently work remotely?
YMMV
Benefits

• No hovering micromanager
• Set your own hours
• No dress code
• No traffic
• 82% of telecommuters reported lower stress levels
• 80% claimed to have higher morale
Potential downsides

• Lack of overall social interaction
• Feeling disconnected from colleagues
• No on-site tech support
• Home distractions
Preconceived Notions
How do you know people are working?
How has being virtual shifted conversations from activity to outcomes (or not)?
How do you keep tabs on excess bandwidth of team members who could take on more work?
How do you manage work-life balance and expectations of availability?
Tips & Tricks: Crowd-Sourced Wisdom
Know Yourself

“I like working alone, but other people need that human interaction. Think about yourself and your own personality. How will working at home alone affect you?”
Dedicated Workspace

“I have a dedicated office, but I enjoy the freedom to work from my couch or sit on the back porch or at the breakfast bar for a change of scenery sometimes.”

“Must have dedicated office space WITH A DOOR – especially you have pets that might be distracting during a video conference.”

“If your spouse also works from home, make sure they have a separate office.”
Set Boundaries

“The hardest thing is making myself turn it off.”
“I work more than I should.”
“Set a schedule for yourself. It is easy to work 10-hour days, but you need to walk away and have a home life.”
Take Breaks

“Force yourself to get up in middle of day for a change of scenery – and don’t eat at your desk.”

“Step away from your desk, take time to walk around, read a book or newspaper at lunch.”

“Take an actual lunch break. Walk away from your computer. Don’t eat lunch at your workspace. It is messy, and you need a mid-day refresh of your body and brain.”

“My watch reminds me to stand up once an hour. My computer announces the time every hour. It’s easy to get so focused you don’t realize you haven’t moved in several hours. We need reminders and technology makes them easy.”
Face-to-Face

- Quarterly staff retreats/meetings
- Mandatory, scheduled in advance
- Includes forced family fun!
- Provides social connection
  
  “Leave some unscheduled time beyond the agenda at retreats to allow time for other things to bubble up – whether work or personal.”

  “Must focus on and make an effort to keep the social connections strong to help everyone work better together.”

  “Schedule periodic lunches to meet with colleagues for social connection and advice.”
Face-to-Face

• 4 of 9 hired after going virtual

“It was easy for me to come in new to a virtual office. I didn’t have the personal relationships with the existing staff, so I don’t miss the face-to-face that I never experienced.”
HR – What to look for in a virtual employee?

- Self-motivated
- Self-disciplined
- Resourceful
- Tech-savvy
- Articulate (especially important with written communications in the virtual environment)
HR – How do you hire a virtual employee?

- Multiple Zoom/Skype interviews with a variety of staff members

- At least one in-person interview
  - Budget accordingly if you’re interviewing out-of-towners
  - Multiple F2F interviews if schedule/budget allow
HR – You can hire anyone from anywhere!

- Health insurance coverage varies by state
- Payroll taxes vary by state
- Different time zones?
- Increased travel expenses for F2F meetings, must schedule in advance, no spontaneous meetings if people live in different cities
HR – How do you onboard a virtual employee?

- F2F (budget accordingly)
- Zoom/Skype
- Retreat (set aside time to orient new employees)
- Check-ins (daily/weekly then graduate to monthly or as needed)
- Allow a year to understand the full association lifecycle
- Personality assessments (DiSC, MBTI, RTC, PI, Egg, Enneagram, etc)
HR – How do you terminate a virtual employee?

• Call your lawyer!
• Follow your regular operating procedures as much as possible
• Every situation is different.
HR – Evaluations

“Our evaluation process is focused on planning. We have done it both in-person and virtually. I did not feel any differently about the process when it was on Zoom, and there was nothing dramatically better or worse about it either way – the outcome was the same.”
Being Virtual – Summary

“The thing that helps me the most is treating every day like I still have to go into an office: not staying in my pajamas, having a dedicated office space, and keeping a semi-consistent schedule. I also try to go to a coffee shop once a week for human interaction since that was a big change for me.”
“I’m more productive, but my hygiene isn’t as good.”
Being Virtual – Summary

Rely on technology to stay connected.  
Slack, Zoom, Dropbox, etc

Don’t rely too heavily on technology.  
It can’t replace human connection!
Article: Surviving the First 90 Days


• Set up workspace
• Get communication tools in order
• Keep a consistent schedule
• Figure out ideal working environment
• Get to know the team
• Find the right balance
• Determine what energizes you
• Utilize video
• Manage bad habits
Article: Hiring Virtual Employees

https://www.themuse.com/advice/4-mustdos-for-hiring-virtual-employees

• Determine the essential traits
• Discover candidates’ intentions
• Learn from past behaviors
• Conduct a test
GOING Virtual

• Who is responsible for making the decision about going virtual and who will be asked to give input? (board, staff, members, etc)

• 100% virtual or hybrid?

• Who visits your office regularly? (members, sales people, deliver drivers, etc)
GOING Virtual

• Conduct a test period
• What is your real estate status? (own, rent?)
• Desired timeline?
• Estate sale! (sell, donate)
Update employee handbook
  o Dress code – events only?
  o Internet reimbursement?
  o Cell phone reimbursement?
  o Policy on dependents living in home? (whether children or elderly)
  o Core hours expected?
GOING Virtual

• Update financial procedures
• Review insurance policies, business license, etc
• Meet with auditor
• Send change of address notice to members, vendors, service providers, professional organizations
GOING Virtual Logistics

- Storage unit
- Mailbox
- Shipping/events
QUESTIONS

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