**Facilitator’s Guide – COVID 19 manager sessions on virtual teams and flexible working**

**NSW Public Service Commission**

March 2020

Contents

[Facilitator’s Guide: COVID 19 manager sessions on virtual teams and flexible working 3](#_Toc35515721)

[Why we’ve provided this guide 3](#_Toc35515722)

[Learning objectives 3](#_Toc35515723)

[Learning outcomes 3](#_Toc35515724)

[Pre-reading for the facilitator 4](#_Toc35515725)

[Pre-reading for participants 4](#_Toc35515726)

[Handouts for the sessions 4](#_Toc35515727)

[Planning ahead 4](#_Toc35515728)

[Administrative support 4](#_Toc35515729)

[Facilitation 4](#_Toc35515730)

[Venue 5](#_Toc35515731)

[Teaching aids 5](#_Toc35515732)

[Publicity/invitations 5](#_Toc35515733)

[Once registrations have been received 6](#_Toc35515734)

[Confirmations 6](#_Toc35515735)

[On the day 6](#_Toc35515736)

[Workshop structure 6](#_Toc35515737)

[Running the sessions 7](#_Toc35515738)

[Instructions 7](#_Toc35515739)

[Pre-session activity 7](#_Toc35515740)

[Post-session follow ups 11](#_Toc35515741)

[Activity 1 A Day in the life of: typical day task analysis 12](#_Toc35515742)

[Activity 2 Outcomes to maintain or enhance 13](#_Toc35515743)

# Facilitator’s Guide: COVID 19 manager sessions on virtual teams and flexible working

## Why we’ve provided this guide

This facilitator’s guide is to support you to offer rapid upskill sessions to managers on how to effectively run virtual, flexible teams when social distancing and minimising employee health risks has become a priority. The focus is on office-based teams who may need to work primarily from home but also includes the other forms of flexibility that may also be necessary.

Your agency may need to run these sessions if feedback from managers and employees is that they feel unprepared for having so much of the team work away from the office. These sessions provide an opportunity to clearly articulate organisational expectations about how it can work, and respective roles and goals.

Use the basic content here and augment it with your own agency’s policy settings for flexibility, any useful process information you think will be asked, especially with regards to technology, and your agency’s vision for the future goals for flexible working in your agency. See also the PSC’s [personas](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/leading-implementation-of-flexible-working/shifting-perspectives-on-flexible-working) and [misgivings](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/requesting-and-considering-flexible-work/typical-misgivings-about-flexible-working) for clues about the sorts of questions and perspectives you can reasonably expect to hear about flexible working more generally, and misgivings some managers have about productivity.

The guide also provides recommended reading to help you gain the background knowledge you’ll need to run the sessions, a checklist for planning and running them, content and additional resources.

## Learning objectives

* To uncover the current attitudes that employees and managers have about working from home and any dilemmas the requirement to socially distance may have on work flow
* To explore the flexible working skills required and any development needed, to provide follow up support.
* To identify the changes in behaviours, habits and processes needed to better support working in a dispersed way, and how the changes can be adopted by individuals, teams and the agency.
* To identify the outcomes (business, team and individual) that need to be maintained or improved, and how best to ensure these are met while working differently.

## Learning outcomes

* Participants will identify how working in a virtual team is different to conventional day-to-day work (even done flexibly), and the routines, processes and habits that need to be established .
* Participants will identify their role as leader in establishing new practices, routines and habits and the necessary enablers for these to succeed.
* Participants will have an opportunity to discuss the local context: flexible working policy and IR framework.
* Participants will know where they can go for further support and resources after the session.

## Pre-reading for the facilitator

1. Your agency’s flexible working policy and procedures, and relevant industrial instruments (Flexible Working Agreement)
2. The PSC flexible working conversation guides for [managers](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/flexible-teams--resources-for-managers/managers-conversation-guide) and [employees](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/working-flexibly--resources-for-employees/employees-conversation-guide)
3. The PSC toolkit for [trialling flexible working for an entire team](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/flexible-teams--resources-for-managers/how-to-make-flexibility-work-as-a-team-)
4. The flexible working skill sets development guides for [managers](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/flexible-teams--resources-for-managers/skill-set-and-development-guide-for-managers-) and [employees](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/working-flexibly--resources-for-employees/skill-set-and-development-guide-for-employees)
5. The [DPC guide to running accessible meetings and events](https://www.dpc.nsw.gov.au/assets/dpc-nsw-gov-au/Events/9bf6c6ac1e/Toolkit-for-Accessible-and-Inclusive-Events-2018.pdf)
6. [The PSC guide to managing dispersed teams](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/flexible-teams--resources-for-managers/managing-dispersed-flexible-teams)

## Pre-reading for participants

1. The [skill sets for managers](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/flexible-teams--resources-for-managers/skill-set-and-development-guide-for-managers-), if you plan to explore manager skill, and later follow up with further support sessions on managing for outcomes and courageous conversations (recommended)
2. Your agency’s flexible working policy and procedures, and relevant industrial instruments (e.g. Flexible Working Agreement)

## Handouts for the sessions

1. Day in the Life of template (soft or hard copy, depending on session)
2. ‘Rules of the Road’ handout
3. [The PSC guide to managing dispersed teams](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/flexible-teams--resources-for-managers/managing-dispersed-flexible-teams)
4. The outcomes to be maintained or improved template (soft or hard copy, depending on session)

# Planning ahead

## Administrative support

The sessions will need to be organised (advertised, registrations received, find and book a venue or set up a tele or video conference, etc.) and session materials prepared.

You will need to know exactly who is attending ahead of time, to send out the pre-reading for those participating remotely. It is suggested that the venue booking include 15 minutes’ set up and pack up time before and after the one hour session – so 90 minutes in total.

## Facilitation

These sessions can be conducted online or face to face, although we recommend you do not blend the two, as it makes for distracted facilitation. Set up a purpose-built session that is one or the other.

It is recommended, although not essential, that two facilitators conduct each session. The session lends itself to a smaller sized group to allow for discussion – no more than 20 people. Because the session is interactive and is about a topic that can be associated with difficulties in the workplace — such as managing poor performance or roles where working from home may prove tricky — it is likely that participants may raise curly questions. The best way to keep to time in the session while at the same time not dismiss issues raised may be to post a ‘parking lot’ sheet on a wall in the workshop space so any issues that are better responded to after the session can be recorded, with a promise that there will be follow up. This would also be the way to handle any questions for which you do not immediately have an answer.

If you have a participant who is disrupting the session, you can respectfully ask the person to reserve their comments for after the session so that they can be properly addressed.

## Venue

You will need a room to hold up to 20 participants for face to face, with AV facilities and seating laid out in a way that enables discussion. Familiarise yourself with how to use the lighting, air-conditioning, projector/AV system, and where the toilets are, etc.

For online sessions, have a quiet room booked for your facilitators. One facilitator should speak at a time, while the other monitors Chat and that people can access the conference and are on mute.

## Teaching aids

You will need:

* a laptop to connect with the AV system to display the slide deck
* all handouts (if using hard copy)
* Internet and/or WiFi access for connecting for the online session.

## Publicity/invitations

Here is an example of text you could use through internal social media channels or calendar invite to encourage participation is below:

***Managing virtual teams during COVID-19 - register now!***

What does it mean to manage a virtual team? How do you protect business, team and individual outcomes? Join us an hour-long session for leaders.

**Date/time:** XX

**Conference link**: (if online) or room

**Objective**: An online or face to face workshop for team leaders of virtual teams – what to know, say and do to maintain or improve business objectives when your entire team is working remotely. How you can improve your team’s social distancing and safely manage health risks while protecting productivity and cohesion.

The session will cover:

1. What it means to manage a virtual team
2. Getting the foundations right
* Comms & IT
* Setting up a Teams space
* Protocols
1. Dilemmas and how to solve them - thinking differently about your work/job and work design
2. Taking a team-based approach – what this means and how you do it
3. Managing for outcomes – intrinsic and extrinsic motivated staff
4. Protecting team cohesion: the importance of routines and staying in touch differently
5. Looking after yourself as well: keep moving, screen time & overwork

# Once registrations have been received

## Confirmations

Email participants to confirm the registration has been received and attach the skill sets self-assessment, giving them instructions about completing it and an expectation they should bring their results along to the session and be prepared to contribute their results anonymously.

Organise name tags or tent cards if the participants are unlikely to know each other for face to face.

Print enough copies of the handouts for the sessions for each participant.

## On the day

Take a laptop with the slide deck loaded, the handouts, pens and name tags.

## Workshop structure

1. Introduction and acknowledgment of country
2. Brief scene-setting
3. What it means to work in a virtual team
4. Getting the foundations right: tech, communication and WHS
5. Dilemmas and challenges: a day in the life of, and identifying dealbreakers
6. Taking a team-based approach to planning
7. Identifying the outcomes to maintain or improve
8. Building your team’s rules of the road
9. Managing for outcomes
10. Protecting team cohesion
11. Looking after yourself

# Running the sessions

Time required: 1 hour

## Instructions

Arrive 15 minutes ahead of the session to set up the AV system, with the slide deck displayed on the projector screen at Slide 1. Place the printed slide decks and conversation guide at each seat, or have them.

## Pre-session activity

You have set the [skillsets](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/skillsets) as pre-reading/homework. This is to generate discussion about any areas they’d like you to especially emphasise or address. If the skills gap is significant, follow up sessions may be required.

Timing is tight, so switch it up according to the skills base you’re working with or extend the session to 90 mins if you feel your agency needs a deeper discussion.

|  |  |  |  |
| --- | --- | --- | --- |
| **Slide #** | **Content/discussion** | **Peripherals/activity** | **Timing** |
| 1 | **Facilitator 1*** Introduce yourself and invite participants to share their names and where they work, if they don’t know each other.
* Outline the session, including the learning outcomes for participants, and make the acknowledgment of country.
* Discuss housekeeping such as where the toilets are located, if necessary.
 | DiscussionSupport: [Aboriginal cultural protocols](https://www.psc.nsw.gov.au/ArticleDocuments/2834/Aboriginal-Cultural-Protocols-document.pdf.aspx) Learning outcomes listed in this guide | 3 mins |
| 2 | **Switch to Facilitator 2****What it means to work in a virtual team*** Start by defining flexibility, and defining a virtual team. If you have 90 minutes you could ask them first what flexible working means to them, before presenting the slide content. If the group is large you could use slido or minti to build on on-screen word cloud as they contribute their definitions. It will help you ‘take a temperature’ if you do not know the group.
* This slide is important because there are a number of assumptions about flexibility that you may need to address. Many managers assume that it comes at the cost of productivity, not that it could enhance it.
* It’s also useful to state why your agency is committed to flexibility and how it could help to protect productivity in the current circumstances. Without technology, it would be hard to implement social distancing, protect staff in at-risk health categories, but also help people to maintain a sense of control and agency in topsy turvy times.
* Then work through the content of the 4Cs listed – invite managers to ask questions throughout and volunteer how they may already be handling these considerations
 | PresentDiscussion | 3 mins |
| 3 | **Getting the foundations right*** This slide provides practical guidance on how meetings must be run differently, technology used to its fullest advantage (and where pitfalls can lie) and the requirements to consider home as a safe workplace
* The emphasis is on advising the importance of structure in meetings, and everyone in the team being very clear on what Plan A is for communicating, then Plan B and Plan C (depending on any tech fails)
* It’s also important to emphasise the importance of how minor WHS issues can expand when people work at home regularly. A smaller monitor at a lower (e.g. dining table) level becomes problematic when used 5 days/week instead of 1. Encourage discussion about planning for borrowing any tech requirements.
 | Present | 5 mins |
| 4 | **Setting up MS Teams*** Before launching into this slide, take a temperature check of familiarity with Teams, and adjust time spent accordingly.
* The focus is how to set up Teams for staying in touch and across each other’s tasks. It’s useful if the group has not used it much
* If they are familiar with Teams, consider switching to a Zoom overview or online collaboration tools such as Nureva (or whatever your agency uses) instead.
 | Present | 2 mins |
| 5 | **Dilemmas and challenges*** Invite managers to discuss their concerns about managing a remote team
* This slide sets up the next activity. Its purpose is to get managers to think through what are challenges of perception, and what are genuine deal breakers for getting the work done?
 | Present/discuss | 8 mins |
| 6 | **Activity: a day in the life of (DILO)*** For this activity, ask participants to spend 5 mins thinking through how their day usually runs when they get to work, the resources used to undertake tasks, and what could fail – then the workarounds.
* The idea is to encourage proactive identification of dependencies.
* It doesn’t need to be complete – the idea is for managers to take the template (email the handouts afterwards as a follow up) and start the conversation within and across their team
 | Handout or screen share Email handouts either before, or after the session as an activity for the manager to take back with their team  | 5 mins |
| 7  | **Switch back to Facilitator 1 to discuss team-based approaches****Taking a team-based approach** * The slide outlines the fundamentals of what to do when managers needing to develop a flexible working plan with and for their team
* The flexibility that employees require isn’t just from home, in a lockdown scenario they may also need to adjust their core and bandwidth and/or start and finish times, switch to a compressed week, go temporarily part-time or job share if significant projects are paused or work is postponed.
* This slide outlines the key steps required, and why this approach alleviates the most stress for managers.
 | Present | 7 mins |
| 8 | **Activity: Outcomes to maintain or enhance*** A crucial part of a team-based approach is having the team identify and agree on which business, team and individual outcomes must be maintained or improved while people work flexibly.
* If managers in the workshop have hybrid teams (with some office based and some frontline), a team-based approach will be crucial (as it won’t be a conventional virtual team)
* Again, this is only an introductory activity – the aim is not completion, but for managers to take the template back to their teams to discuss and agree. It then becomes a measure by which to track arrangements for impact and efficacy
* You can refer to the PSC [team-based design toolkit](file:///C%3A/Users/BRAHES/ObjectiveHome/BRAHES-sfobjprod.govnet.nsw.gov.au-8008/Objects/Go%20to%20toolkit%20for%20designing%20your%20own%20team%20trial%20of%20flexibility%20here%3A%20%3A%20https%3A/www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/design-your-own-flexible-working-trial) (having a copy of the toolkit handy helps) for further information – this toolkit helps provide more detail
 | Handout | 5 mins |
| 9 | **Work design*** Remind the managers that in the team-based process, to combine the outputs of the DILO and the outcomes to see if productivity (or more flexibility) can be unlocked through work re-design or work share.
* A crisis, or tricky technology, can force innovation. Encourage them to explore this with their teams as it may prove necessary in the short term, but pay off in the longer term.
 | Present | 5 mins |
| 10 | **Rules of the road*** These are the protocols that teams need to adopt to make the ‘how’ of flexibility work.
* Again, these are best designed by the team itself, but we can share an example (or use one as a handout), although emphasise any that the organisation has mandated.
* This slide deliberately discusses the practicalities of making it work, in order to build confidence, particularly amongst managers, to ‘give it a go’ and shift the workplace culture to be a shared team-based experience rather than focusing on the individual. At the same time, individuals are encouraged to take responsibility for self-managing and making changes to the way they work.
* Key to building trust is that the team co-design them, and then stick to them – the manager’s role is then to steer, rather than patrol.
 | Present | 5 mins |
| 11 | **Managing for outcomes*** The emphasis of this slide is on the importance of ensuring that performance plans are rigorous and up to date (and updated ASAP if not already).
* These provide employees with certainty over what they will deliver (although projects may change and this should be acknowledged) and to what standard, and becomes the way by which you measure progress and success
 | Present | 3 mins |
| 12 | **Switch back to Facilitator 2 for looking after your team cohesion*** Tips to ensure the team stays connected and care about each other
 | Present/discuss | 4 mins |
| 13 | **Looking after your team and yourself*** This slide talks more to the ‘soft’ skills side of helping employees to adjust to a new way of working, including the managers.
* It covers isolation, the importance of routines, of being able to plan and prioritise work, and exercise for staying mentally and physically well in scary times
* A good technique is to encourage buddy systems or having people check in on each other, so its not all the manager’s responsibility
* Ask people to share (if comfortable) what they’re doing already in their team, or like to do personally
 | Present | 3 mins |
| 14 | * Wrap up the session and encourage everyone to advocate for trust and understanding in their teams and in interactions with stakeholders across the NSW government sector.
* If you are planning further seminars or communications about COVID or capability areas such as managing for outcomes, you can mention them to encourage participation, and to let teams know that support is available where any particular capabilities need further development.
* Also point people to further resources from the PSC if they want more support or information on flexible conversations, team based design or managing virtual teams
 | Present | 2 mins |

# Post-session follow ups

The sessions may be just one activity in the context of a range of activities, communications or other initiatives that promote flexible working and/or your COVID-19 response across your agency. You may also want to consider social media posts, printed materials such as posters or notices in staff areas, handing out collateral such as lanyards, an intranet space dedicated to flexible working or other activities.

*From an agency-wide implementation perspective*, the PSC [Flexible Working Change Playbook](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/leading-implementation-of-flexible-working) will assist you to develop an effective change strategy and identify any other initiatives needed to build on the lessons learned and the opportunities for more work re-design or flexible ways of working.

*The team-based design toolkit* ([Design your own flexibility trial](https://www.psc.nsw.gov.au/workplace-culture---diversity/flexible-working/design-your-own-flexible-working-trial)) is the next logical step for employees and managers as a resource to address how they make it work at their team level. It goes into much more detail about roles and responsibilities, how to identify what flexibility might be possible in a specific team context and how to agree operational protocols and principles, success factors and check if its all working as intended.

From a skills uplift perspective, use the results of the skills discussion you may have asked managers to do to identify any additional support or training that might be needed (and the accompanying development guide will provide resource ideas here). This can be drip-fed via your social media channels. Managing for outcomes and courageous conversations are typically two areas that may surface if extended periods of working virtually are required.

If there have been issues raised at the session that were posted on the ‘parking lot’, make sure you follow up by email to participants or directly with the individuals who raised the issues.

# Activity 1 A day in the life of: typical day task analysis

|  |  |  |  |
| --- | --- | --- | --- |
| **Tasks undertaken*****(work methodically through typical day start to finish)*** | **Resources needed to get it done *(tech, human or financial)*** | **What could possibly go wrong?**  | **Workarounds**  |
| *e.g. Open email and address urgencies* | * *Laptop to access*
* *Records management system to save*
* *Printer if preferred*
 | * *Laptop breaks*
* *Records system glitches*
* *VPN/home WiFi fails*
 | * *Install Outlook on phone*
* *Use personal computer*
* *Save emails to desktop and restore to central records system regularly when available/OneDrive*
* *Use a safe, available alternative for WiFi (within privacy) – café, library*
 |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Activity 2 Outcomes to maintain or enhance

|  |  |  |
| --- | --- | --- |
| **Business** | **Team** | **Individual** |
| * *Productivity (quantify if able)*
* *Responsiveness (quantify if able)*
* *Stakeholder feedback remains positive*
* *Capability maintained*
 | * *Positive team culture*
* *Cooperation to achieve outcomes and flexibility*
* *Sense of belonging*
 | * *Skills development*
* *Career opportunities*
* *Work-life balance*
* *Efficient use of time*
 |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |