

Managing A Remote Workforce: Challenges & Strategies

Non-Profit Financial Managers Presentation

Presenters



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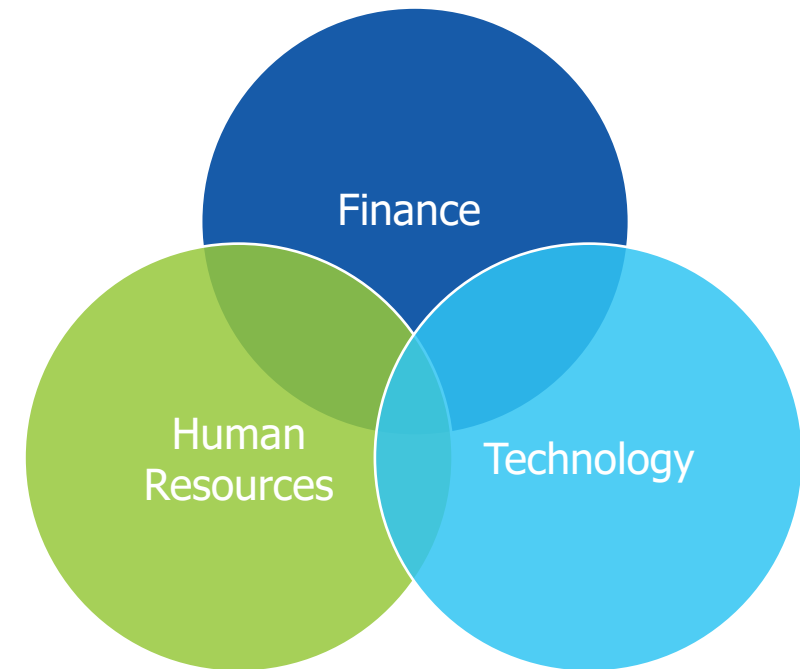
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About Us: Insource Services, Inc.

- Finance, HR, and IT Consulting Firm
- Based in Massachusetts

"At Insource, we believe that HR, Finance & IT start with people."

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What We Do

- Full department outsourcing; generally part-time and long-term
- “A la carte” services, as needed
- Assessments
- Training
- Recruiting
- Project/Interim assignments

How We Do It

- Seek to understand client businesses and missions
- Experienced, expert senior account leaders
- Client teams; work is performed at the most cost-effective and appropriate expertise level
- Approximately 90 employees

Rationale

As workplaces become increasingly more remote now and possibly post-pandemic, organizations need to examine operational compliance, security, and organizational culture challenges and opportunities to adjust to this new reality.

Objectives

- Identify workplace challenges and opportunities
- Examine security, training and policy implications
- Explore reimbursement consideration and emerging trends
- Discuss practices and strategies for employee engagement, efficiencies, and automation
- Consider the impact of having employees working from different states
- Review benefit considerations

Questions Employers are Asking

- What worked, what didn't?
- Surprises, learning?
- How are my employees? Do they have the support they need both professionally and personally?
- How was productivity?
- How would we evaluate our productivity, communication, collaboration, feedback, and support?
- What are the pros and cons of remote work and how can we make it better – do we want to continue it longer term full time, in a hybrid model, not at all?

For many organizations, the forced remote work experiment was an unexpected success for the business and employees, and it is clear, some form of remote work is here to stay.

Employer Opportunities

- **Financial Savings** – rent, office supplies, travel expenses, food, water cooler productivity
- **Productivity/Output** – employers report greater output from many remote employees
- **Expanded Talent Pool** – geographical limitations removed in some cases
- **Increased Diversity** – different cultures with different perspectives, experiences, backgrounds, and ideas
- **Enhanced Customer Service/Coverage** – varying time zones provide expanded coverage
- **Competitive Edge** – job seekers are looking more closely at employers who offer remote work options
- **Enhanced Flexibility** – ability to work at varied times allowing at home support/time with family
- **Expanded Work Opportunities** – options beyond geographic region
- **Get Creative** – new ways of work, employee support, communication and engagement

Employee Opportunities

- **Financial savings** – commuting expenses, expensive lunches, expanded childcare, wardrobe
- **Time savings** – commute
- **Productivity/Output** – employees report being more productive at home than in the office; uninterrupted focus (in some cases)
- **Enhanced Flexibility** – varied times allow more home support and time with family, convenience for some
- **Expanded Work Opportunities** – options outside their geographic region



Employer Challenges

- **Employee Wellness** – supporting employees in a different work environment with different stressors
- **Considering all the options** - what works best for your organization or industry
- **Managing Performance** – how do you manage employee performance when you can't "see" employees
- **Complex Laws/Regs**– managing and applying varied state laws, business registration, tax implications, unemployment
- **Confidentiality** – protecting important information/trade secrets – extending and reworking current policies
- **Developing Culture** – how to keep values, culture, and connectedness
- **Implementation of remote work plan** – shifting thinking about norms e.g., work hours/hours per day vs output
- **Communication** – how to keep employees informed, connected, and engaged
- **Technology** – finding and integrating programs to enhance security, productivity, communication, and community – setting up standard protocols early (what gets communicated and how, expectations for tool use, translating office professional standards into professional at home standards)

Employee Challenges

- **Work/Life Balance** – “always on” - employees report having a hard time setting boundaries around work time
- **It’s not for everyone** – some do not like working at home; some need or prefer in-person interaction
- **Isolation** – isolation is a real problem – can lead to depression, anxiety, and more
- **Communication** – not being able to “read” non-verbal cues; not feeling connected to colleagues/manager
- **Culture** – not connected to the organization, to the mission, vision, or values
- **Advancement** – fear of missing opportunities offered to in-person staff
- **Home Office** – not everyone has dedicated “office” space – home can be hectic and more challenging
- **Understanding company norms/culture** – hard to figure out best practices, ways of working



Employer To-Do List

1. Assess Current Staff

- Understand how current staff and management feel about remote options.
- Who is be eligible and is the criteria fair?

2. Revised Job Descriptions

- Assess essential functions and how those may shift in a remote environment.
- Revisit expectations.

3. Financial Considerations

1. Remote tools and outfitting, out of state business registrations and obligations.
2. Different pay rules, admin time/cost to manage remote nuances.

4. Employee Wellness – are our employees ok; supporting employees with work fatigue, work/life integration, mental health, building community; provide EAP and/or other support, thoughtful actions to let staff know you care.

5. On-boarding – how to integrate new hires – consider a buddy system so new hire has one solid connection to start.



Employer To-Do List

- **Remote Work Policy** – develop a specific remote work policy to include specific options (full remote, hybrid, shared workspaces), work hours, time keeping for non-exempt staff, eligibility, protecting confidential information, issuing office equipment, IT guidelines, expense coverage, reporting accidents; if not full remote, set up an emergency remote policy
- **General Policies/Handbook** – review handbook for state specific references
- **Performance Management** – focus on productivity, output, deliverables; set quarterly objectives, achievable deadlines/targets, deliverables, output
- **Employee Engagement / Company Culture**

Employer To-Do List

- **Communication Standards** – clear, consistent and timely; deliberate, one-on-one & group, get to know employees personally, communicate company values, mission, expectations, model the behavior you want to see in employees; centralize information electronically/make it easy to find; what IT tools work best; when to use IM, email, video etc.
- **Enlist the help of staff** – surveys, communication strategies, social events, facilitation, etc.
- **Training** – required training; skills training to support a virtual workspace; how to balance time/work-life balance, how to deliver feedback, performance management.
- **Consider and Establish Clear Values, Mission, Behaviors**
- **Look to organizations who have done this successfully** – don't reinvent the wheel – refer to companies who practice successful remote work environments.

Considerations

- **Compliance**

- Minimum wages
- Exempt/Non-exempt
- Time keeping and breaks
- State mandated leaves
- Other employment rules – final pay, mandatory sick time, etc.
- Licensing

- **Benefits**

- Health insurance coverage
- Reevaluate your benefits spending priorities

- **Reimbursement**

- Phone, internet, office equipment – what will you pay for. Mirror in office set ups?
- Reimbursement caps

Considerations

- **Policy updates**

- Mileage policy changes if home is place of work.
- Handbook strategies.

- **Taxes and business registrations**

- The “physical presence” rule requires employers to withhold at the rate for the state in which the work is performed, even if the business is headquartered in another state.
- Some states require withholding for both locations.
- A remote worker who performs work in a state may be obligated to pay tax there and might also create new tax withholding obligations for the employer.
- Business registration requirements vary by state.

Considerations

- **Workers Compensation**

- Workers compensation is state-specific, a work-related injury for a remote worker could create confusing and difficult issues for employers, i.e., notably when the employer was not aware of the employee's relocation to another state.

- **Data Privacy**

- Reinforce confidentiality obligations (specifically Written Information Security Policies and policies are legally protected personal data) and reinforce security expectations, modify for at home use (shredding, filing, printing, etc.).
- Offer security training – Attata like training, run bogus security breach drills.

- **Relocation Expenses**

- Review policies to determine how they might be read by a remote worker who chooses a voluntary relocation.

Considerations

- **Required State Training**

- More than one-third of the states have a law mandating sexual harassment training, with the specific substantive requirements, target audience, duration, and frequency varying among jurisdictions.
- Revisit system for reporting and investigating complaints
- Manager training

- **Hiring and Firing**

- Review process – implement alternatives where needed revisit traditional procedures for those in remote environments.

Questions?

Contact Information



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