

Tips for Working Remotely & Virtual Collaboration

Tools & Resources for Nonprofits

Objectives

- Share tips and best practices for working virtually and ensuring your home environment is the foundation for your productivity.
- Discuss strategies to effectively collaborate across staff meetings, 1-on-1 meetings, and project meetings based on a framework developed by Mary Alice Arthur (Story Activist).
- Review team and project collaboration tools currently on the market

Importance of Adapting to a Virtual Environment





Mary Alice
Arthur
(Story Activist)

“Little actions count greatly because everything is amplified online. If you've been attending a poorly run meeting, it will be worse online. If you've been offering only one-way content or playing only to certain choices, it will be more obvious there's no participation. If there is disconnection in the group or the wider field, it will be more noticeable. But the reverse is also true. If you're with someone who knows how to create a container for connection and good collaboration, you'll come away feeling energized and stimulated. In forcing us online, this crisis has also created new and intriguing mixtures of people and the opportunity to make connection, collaboration and collective meaning in inspiring ways.”

Common Virtual Collaboration Tools

Discussion Platforms & Social Networks	Videoconferencing & Webinars	Project Management Tools	Document Sharing & Collaboration
Look for private platforms and tools that allow members to engage in meaningful relationships—interact, collaborate, share, learn and solve their top-of-mind problems.	Many videoconferencing tools have enhanced tools, such as live chat, polling, and screensharing that can make meetings more interactive and engaging.	Project management tools offer teams a centralized hub for each project and an exact place where a team member can find resources for decision-making.	Cloud-based storage allows easy access to documents. Other tools also offer tools for simultaneous collaboration within a file.
Examples: BulletinBoards, CreateAForum, Hoop.la, Nabble, Slack, Tapataalk	Examples: Adobe Connect, Google Hangouts, GoToMeeting, Microsoft Teams, RingCentral, Skype, WebEx, Zoom	Examples: Asana, BaseCamp, Clutterpad, Evernote, Huddle, Jira, Trello	Examples: Adobe Document Cloud, Box, DropBox, Google Docs, Google Drive, Microsoft SharePoint

Framework for Collaboration & Hosting

Focus 	Outcomes 	Check-In 	Checkout 
Begin with the “end in mind” when hosting and preparing for a 1-on-1 or team meeting. Avoid "slot management" wherein an agenda consists simply of slots being filled	Clearly define what you want at the end of your project Ask yourself what tangible and intangible results you want to produce from meetings	Minimize disruptions upfront by having a “Check-In.” Check-ins helps team members become present by inviting their focus to this particular meeting.	At the end of your meeting, make a clear close by including a “Checkout” Ask your teammate or team members what they are taking away or some insight they gained

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Tips for Adapting to Virtual Work Environment & Meetings

Dimension	Establishing Your Virtual Environment	Driving a Virtual 1-on-1 Meeting	Driving Virtual Team Meetings
Focus	Focus on Culture	Focus on the Individual	Focus on Team Products & Deliverables
	<p>Curb isolation and sustain team culture by continuing to celebrate birthdays, recognitions, and other events virtually</p> <p>Hold coffee or tea breaks that do not focus on work</p> <p>Communicate with your team and manager what meeting pace works best for you and your at-home needs</p>	<p>Have a recurring calendar invite for one-on-one meetings</p> <p>Have an outlined agenda you would like to cover</p> <p>Email tone is inviting</p> <p>Ensure you know the accessibility needs of the individual</p>	<p>Match timing with the cadence of deliverables</p> <p>Recognize team accomplishments</p> <p>Email reminder for time sensitive action items and outcomes</p>
Outcomes	Outcomes: Productivity & Comfort	Outcomes: Feeling Heard & Having Clear Next Steps	Outcomes: Team Feels Heard and Has Clear Next Steps
	<p>Keep messaging short when using instant messaging</p> <p>Keep your objective in mind</p> <p>Establish the right tone & clear/concise verbiage upfront in emails, IMs, and videoconferencing</p> <p>Avoid using “absolutes” such as never, always, impossible, or cannot. Soften the absolutes if you want to be more credible online</p>	<p>Turn off all devices and notifications not needed for the meeting</p> <p>Use video when possible and offer an audio dial-in option as a back up</p> <p>Send an email summary of action items</p> <p>Email tone is appreciative</p>	<p>Ensure everyone has access to document repositories</p> <p>Ensure you know the accessibility needs of all team members</p> <p>Periodically ask for feedback on how meetings can be improved</p>
Check-In	Outcomes: What is Going to Distract Me?	Check-In: What Do They Want to Talk About?	Check-In: Ensure Everyone’s Voice is Being Heard
	<p>Try maintaining regular work hours to align yourself with the same work schedule at home</p> <p>Find a dedicated & comfortable sitting area while working from home</p> <p>Confirm that you have a strong Wi-Fi connection</p> <p>Minimize background noise</p>	<p>Send an instant message if running late</p> <p>Body language is in listening mode</p> <p>Recognize milestones and accomplishments</p> <p>Ask check-In questions: What inspired you today? What do you want to talk about today?</p>	<p>Introduce new team members</p> <p>Ensure everyone has access to the tools being used for the meeting</p> <p>Remember to include participants on audio-only in conversation</p> <p>Ask check-In questions: What inspired you today? What do you want to talk about today?</p>
Check Out	Checkout: Do I Have the Tools I Need?	Checkout: What Do They Need Help With?	Checkout: Ensure All Blockers Are Identified
	<p>Ensure your manager knows your accessibility needs</p> <p>Video conferencing is a key component for virtual meetings & communications, so it’s best to select the tool that allows proper camera and lighting</p> <p>Test sound from your computer to ensure it’s in sync with the tool</p>	<p>Revisit actions from the previous 1-on-1</p> <p>Ask checkout questions: How can I help you? What do you need? How would they like to continue growing their professional development virtually?</p>	<p>What have they completed?</p> <p>What are they working on?</p> <p>What are their blockers?</p> <p>What is keeping them up at night?</p>

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