“BEST PRACTICE” INSIGHTS AND TIPS

FOR CREATING SUCCESSFUL VIRTUAL LEADERSHIP TEAM ENVIRONMENTS 

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| The Concordia St Paul Educational Leadership Department provides the following “best practice” insights and tips to support leaders and teams experiencing a *virtual team environment* due to the Covid-19 crisis. The shared “best practices” are based on sharing from a variety of leadership articles and publications. The focus provides successful supports for: * ***Working from home***
* ***Virtual meetings***
* ***Email usage in a home work setting***

PLEASE FEEL FREE TO SHARE WITH COLLEAGUES AND OTHER ORGANIZATIONS |

BEST PRACTICES FOR WORKING FROM HOME

1. Create work, life and family boundaries
	* Establish routine with family and define expectations with children
	* Create home “work zones” for families, including school-aged children
	* Create an morning routine
	* Establish daily personal health practices with nutrition & exercise
	* Recognize the need for and schedule socialization
2. Experiment with creating a productive work environment
	* Dedicate a space
	* Declare active work hours when available for communication
		+ Teammates and family members
3. Connect with team
	* Schedule meetings
	* Schedule regular check-ins (similar to work site check-ins)
	* Determine weekly projects by team and individuals on team
	* Connect with team assistants & secretaries
		+ Regular check-ins, tasks & projects
4. Determine and prioritize individual and team projects
	* Define outcomes and responsibilities
	* Complete regular check-ins on project
	* Seek team or consultant support when needed
5. Assess and adjust work schedule on regular basis
	* Evaluate from a self, family and team lens
	* Check: What should continue, what could stop, what could change
	* Maintain a “growth mindset”

BEST PRACTICES FOR VIRTUAL MEETINGS

* Technology tool should reflect purpose of meeting
	+ Team availability and access
	+ Assess access to tech tool, given high use demand
	+ Level of security required
	+ Predetermine need for tech support
	+ Video-based creates most options
* Test technology before the meeting
	+ Ensure microphone and camera are operating
	+ Create a proper work setting for video- lighting & background
	+ Use headsets when possible
* Establish virtual meeting guidelines
	+ Begin on-time for start of the meeting
	+ If using video, ensure camera is operating
	+ Identify self when talking, especially audio only
	+ Limit sidebar conversations and multi-tasking during meeting
	+ Mute microphone when not speaking & remember to unmute
	+ Identify a facilitator for the meeting
* Create meeting norms and agenda beyond virtual meeting guidelines
	+ Identify meeting objectives and timeframe of agenda items
	+ Begin with “check-in” to engage participants
	+ Allow time for team “breaks” during the meeting
* Keep participants engaged in meeting
	+ Limit virtual presentations to 10 minutes
	+ Provide periodic discussion times
		- Limit to 30 second comments or pass
	+ Use “living-shared” meeting document (i.e. Google) for participants to follow
	+ Frame process for discussion challenging issues
		- Use a problem-solving tool
		- Allow periodic discussion times during process
		- Provide more description when using audio only
* Review and summarize meeting
	+ Identify determined follow-up actions
		- Personnel responsible
		- Medium for sharing and timeline
	+ Provide time for “check-out” by participants
		- Allow optional “social sharing” time after meeting closure
	+ Assess and adjust meeting approach based on team feedback

BEST PRACTICES FOR EMAIL USAGE WHEN WORKING FROM HOME

* Continue with successful email protocols and management
* Manage and limit emails to teammates
	+ Create a list of information or questions in an email
	+ Seek to limit to 2 or 3 per day to teammates
	+ Avoid CC or BC when possible
	+ Use other electronic tools for team tasks or project management
* Establish a “1-2-3” System in the subject line to determine action
	+ 1- Time sensitive and need action
	+ 2- Not urgent and respond in timely manner
	+ 3- No action or response required and review when convenient
* Re-read before clicking send
	+ Remember emails are intended to share information, not emotion
	+ Reflect if a phone call might be more effective

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| The Concordia St. Paul Educational Leadership Programs provide graduate level leadership programming for Minnesota Educational Licensure and Doctorate in Education. The program focuses on maximizing the leader’s talents to transform communities through educational leadership with a focus on equity, ethics, community, innovation and scholarship. For more information, please contact the program website (<https://www.csp.edu/academic-programs/educational-leadership/>) or contact Chair Ric Dressen (dressen@csp.edu). |