TeleTeam

Teleportal Deployment
Innovation Through Collaboration

DEPLOYMENT PRIORITY

The goal of TeleTeam is to deploy an interactive message board style portal. The goal of the system is to facilitate communication of staff at varying levels with regards to telework as well as provide resources to help employees succeed.

## STATEWIDE CONSIDERATIONS:

Telework has fundamentally changed the way in which the state both completes work and allows their employees to work.

Moving forward, the state will have to consider both accessibility and equity in telework:

ACCESSIBILITY:

- **People** –Are the staff being given an accessible path to begin, amend or terminate telework agreements?

- **Process** –Are work processes being developed or altered to fit into the new reality of telework?

- **Technology** –Are staff at all levels being given access to the technology they need to succeed?

> " *So our moonshot is, simply put, to transform our workplace. Beyond just the talking point to fundamentally changing the work experience for employees across our Agency...Long before the telework policy was issued by California Human Resources Department, we decided to really lean in on telework or remote work and make it the norm, not the exception. In other words, go from very few people remote working to most of our workforce!*
> -Secretary Wade Crowfoot, CNRA, January 27, 2022 "
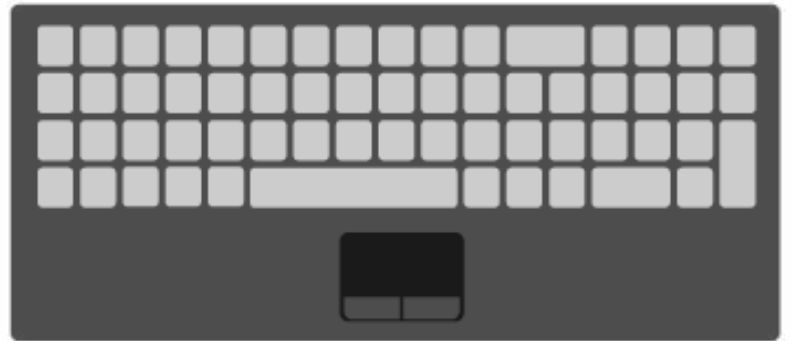
> " *Telework is reliant on internet connection. We need to make sure that there is broadband connectivity throughout the entire state.*
> -Stephanie Tom, Chief Consultant, Asian Pacific Islander Legislative Caucus, CA Assembly "

EQUITY:

- **Telework Assignments** –Are staff being considered equitably when requesting telework? Are the managers responsible for granting/denying telework being provided the tools to evaluate and make informed decisions?

- **Promotional Opportunities** –Are staff being treated equitably when it comes to promotional opportunities even when teleworking? Are supervisors/managers being coached and supported to consider teleworking employees equitably when compared to office-based employees?

- **Supervisor Access/Coaching** –Are staff being granted equitable opportunities to meet and confer with their management regarding roadblocks when working from home? Are staff being provided equitable opportunities to work with other employees to receive cross-training or support? Are managers ensuring that these opportunities are available and working to build systems that support teleworking employees?

- **Training** –Are staff being provided equitable opportunities to receive training to enhance their career opportunities even when working from home? Are managers being equitable in granting training requests or directing employees to training who are working from home?

DEPLOYMENT PLAN
SUMMARY

TELETEAM PLANS TO DEPLOY THE FOLLOWING:

- A message board style system of collaboration with
- Unique teams specific to a user's level (line-level staff, managers & telework coordinators) and
- Opportunities for line-level staff to create in wisdom circles (create solutions through discussions with one another with input from managers) supported by
- Assistance and guidance from managers and telework coordinators and
- Access to resources to ensure success in teleworking

> " *As it applies to learning and development programs, I'm going to leverage the investments we have made and continue on that path. I have no plans to return to the classroom environment. Not that we won't because I do believe we will. But when we do, we're going do it on purpose and with intentionality. We're establishing a new foundation of design for our programs that's going be more sustainable and future proof. And when that statement is challenged and proven wrong we will be ready to adapt and move because we will have lessened our dependencies and we'll be ready for that change.* "
>
> -John Sanborn, Chief Learning Officer, CalHR

The current state regarding telework presents issues on multiple fronts. Staff lack access to resources needed to succeed while teleworking, peer-to-peer collaboration outside of the routes available within their agencies (siloed workgroups), have few opportunities to engage with management outside of their direct supervisory chain and are rarely offered the chance to affect real change to telework.

The goal of the Teleportal deployment plan is to provide an opportunity for staff, managers and telework coordinators the opportunity to collaborate on issues facing them with regards to telework. They will be supported in this effort by access to resources that support an employee's success in teleworking.

Managers and telework coordinators will have their own groups to discuss issues surrounding teleworking that will not be available to line-level staff. Managers and telework coordinators will also have the ability to 'parachute' in to line-level staff conversations to offer solutions, validate answers staff discovered through their own discussions (wisdom circles) and find and pursue creative alternatives driven by those processing the work each day.
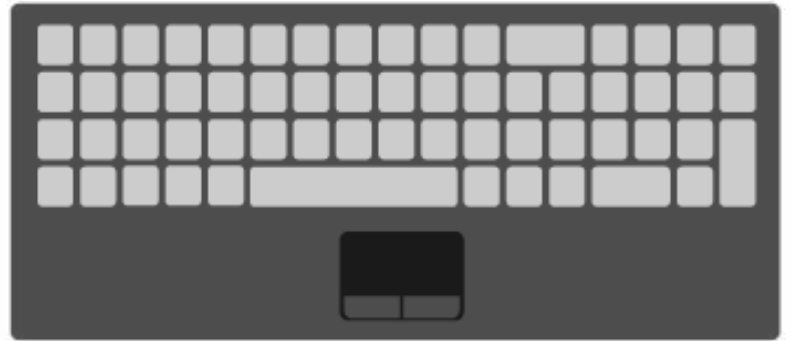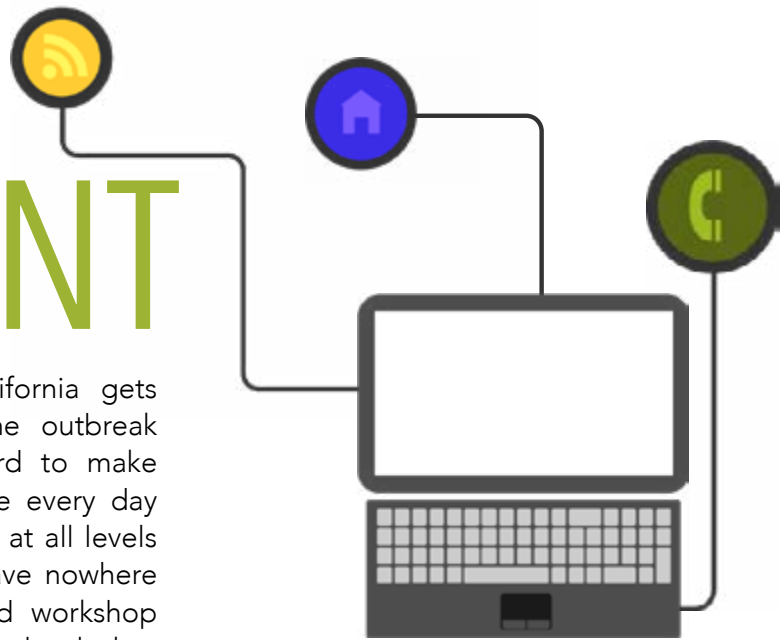
The product is desired to be a state-owned and supported system that provides the following functions as requested by the dedicated state employees joining this team for the Hackathon in April 2022:

- Easy Access to Support (Sunnie S-Munar, SCO; Katina Smith, DMV; Vina Uy, DMV)
- Links to Resources (Monica Nolte, DWR; Jackie Pace, DMV; Candy Craft, DMV; Molly McClure, SCO; Jennifer Black, DTSC; Sunnie S-Munar, SCO)
- Topical Threads with Current Information (All Hackers)
- TelePortal FAQ (All Hackers)
- Telework FAQ
- Profiles (All Hackers)

PROBLEM STATEMENT

In 2020, the way in which the State of California gets work done changed fundamentally due to the outbreak of COVID-19. While the state has worked hard to make telework a reality for employees, problems arise every day that create roadblocks to success. Currently, staff at all levels (line staff, managers & telework coordinators) have nowhere to turn to collaboratively discuss problems and workshop solutions related to telework. These same staff also lack a centralized location to access resources related to telework.

BACKGROUND

CURRENT STATE

Currently, the state has no cohesive telework plan that applies from agency to agency. Staff are not guaranteed training, support or feedback needed to succeed while teleworking. Any resources are dependent solely on the department and the manager assigned to provide them to the employee. This disadvantages both the employee and their manager neglecting to approach telework as a whole-system (people, process & technology).

While this has allowed for some employees to both grow and thrive, it's an unsustainable model that fails to account for staff moved to telework that may need additional support and resources. Without a location for staff to discuss concerns and find solutions, without a place for managers to workshop changes and see success, without a place for telework coordinators to create a unified front, there will be people who will fall through the cracks. The end result is a state with unhappy employees, unsupported managers and taxpayer dollars not providing the maximum benefit.

INFLUENCES (EXTERNAL & INTERNAL)

Approaching these concerns from an external standpoint, staff and management are under pressure from stakeholders such as the public, elected officials, the media and others to continue to provide the same or a higher level of service than pre-COVID. Further, these external stakeholders aren't privy to internal communications and policies that may be working to meet their needs but have not yet been implemented.

Internally, staff and management are under pressure to be agile and adapt to changes on the fly. Policies and procedures that were written for an in-office environment may no longer properly cover work being done from home. Technology designed for staff to be present onsite doesn't allow for rapid transition to a home or hybrid environment. Executive and middle managers accustomed to having staff present in order to monitor their work may not be readily able to adjust their management styles to a full or hybrid work from home strategy.

CUSTOMER BASE

Line-level staff, management (all levels) and telework coordinators all require a solution to help bridge the gap between the current state of telework within California and the future state. The desired future state will be discussed later in this document.

CUSTOMER IMPACT OF CURRENT STATE

The lack of a system that centralizes conversation and resources related to telework has created a fragmented system of application throughout state government. Line-staff lack access to resources and answers that can help them to succeed as they are transitioned to telework or when seeking access to telework opportunities. Management lack access to information from other managers who have achieved success or solved a problem they are facing today. Telework coordinators lack access to successful implementation plans that have been shown to work in other places, causing them to 'recreate the wheel'. All of these impacts are out of line with Lean Six Sigma in that they encourage rework, provide few opportunities to refine work processes and generate lower quality outcomes overall.

COST OF STAGNATION

Ivey Business Journal sums up the current state as "Change puts a premium on adapting; the faster the pace of change, the greater the premium. Take away change and there is no need to adapt; if it worked yesterday, there is every reason to believe it will work today." (McCallum et al., 2015). This is an easy thought process to accept. Yesterday's process should work today, so why change?

> **It is not the strongest species that survive, nor the most intelligent, but the ones most responsive to change.**
> -Charles Darwin

Failing to change has a tangible cost. If employees, managers & telework coordinators continue to be left to their own devices, they will come up with solutions that are less surgical and more triage. By creating a unified system where staff, managers and telework coordinators can discuss, find solutions and deploy them broadly. This creates a unified, consistent approach to problems that leave employees, external stakeholders and executive management with the understanding that a decision at one department will be similar at others.

OPPORTUNITY

FUTURE STATE VISION

The desired future state is a government where employees at all levels have the opportunity to collaborate, create and execute changes in telework that affect the whole-system (people, process & technology). Ideally, staff will be working collaboratively in wisdom circles wherein they workshop ideas to find solutions. Management will then be able to vet these solutions, provide feedback and input on the feasibility.

If an idea is particularly poignant or usable, management could return with it to their management group to discuss implementation cross-departmentally. Telework coordinators can provide feedback and input as well as move adoption forward by moving formulated solutions to executive management.

CURRENT/FUTURE STATE GAP

At present, employees have no ability to discuss problems faced in telework beyond whatever systems are in place at their agencies. Internally, staff may have access to messaging solutions (Teams, Slack, Zoom, etc.), Learning Management Systems or other systems, but those discussions only go so far. Further, these discussions are not inherently inclusive of management and the telework coordinators who are able to provide actionable execution of any solutions found.

At present, the state is only a small distance towards the goal of breaking down silos between staff at each agency at all levels. In creating a new system that destroys silos and encourages opportunities to collaborate, solutions can be executed on broadly versus today where they are singularly implemented.

VALUE PROPOSITION

By creating a collaborative interactive system for staff at all levels to discuss telework, we as a team aim to meet the needs of varying customers. Line-level staff may be searching for quick solutions or a chance at engagement to further change. Management may be searching for new avenues to meet programmatic, statutory or agency directives. Telework coordinators may be looking to find a unified way to answer a tired question that keeps being asked repeatedly. By catering to these various internal stakeholders to meet them at their level, we hope to give voice to those searching for one with regards to telework.
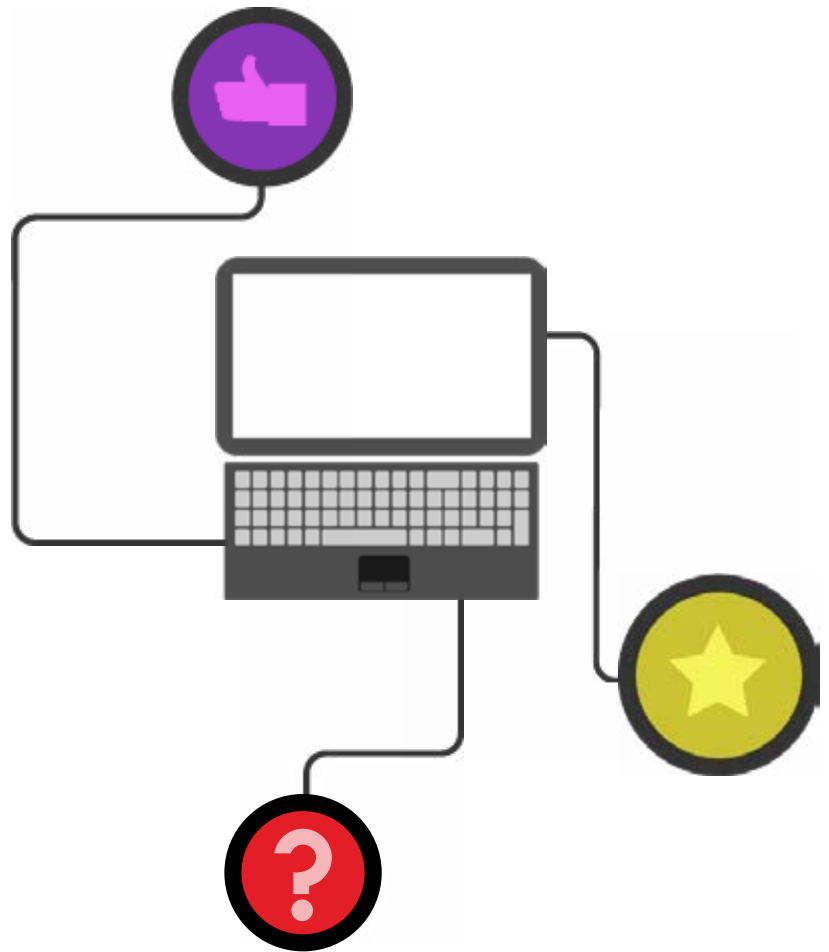
BENEFITS

Line-level staff will be given the opportunity to participate outside of the silos of their workplace and level. Collaboration and involvement in a system like the one being proposed also creates a network of success that encourages finding solutions and having their voice heard. Staff who actively engage will be rewarded by the system via badges. Finally, this also allows staff to network with management, create contacts and possible opportunities for upward mobility by showing their value in a live setting.

Management will have the opportunity to leverage the skills, knowledge and ideas of staff outside of their regular purview. Ideas that are of particular interest can be further workshopped in the management discussion group. The system also provides an opportunity for on-the-fly mentorship of staff and the chance to see potential future employees' value to their agencies.

Telework coordinators will have the chance to test out changes to policy or procedure by putting them in front of the people who they will directly affect. Telework processes and resources can be refined based on real world input from varying levels of employees. The value of direct feedback in crafting changes cannot be understated.

ALTERNATIVES

Considering the needs of the state with regards to telework, there are alternatives to a message board style system.

LIVE MEETING SYSTEMS (MICROSOFT TEAMS/ZOOM/ETC.)

Analysis (Pros):

- Allows creation of lessons that can be pre-recorded and utilized by staff on a recurring basis.
- Permits live discussion during set times with facilitation by approved instructors.
- Allows feedback and evaluation of information uptake via quizzes.

Analysis (Cons):

- Relies on resources (people, process & technology) to create lessons/learning materials.
- Discourages creation of new modules unless authorized as one of the resources.
- Assumes all staff has the same needs to be met.

LEARNING MANAGEMENT SYSTEMS (LMS) [BLACKBOARD, ETC.]

Analysis (Pros):

- Allows creation of lessons that can be pre-recorded and utilized by staff on a recurring basis.
- Permits live discussion during set times with facilitation by approved instructors.
- Allows feedback and evaluation of information uptake via quizzes.

Analysis (Cons):

- Relies on resources (people, process & technology) to create lessons/learning materials.
- Discourages creation of new modules unless authorized as one of the resources.
- Assumes all staff has the same needs to be met.

TELEPORTAL

Analysis (Pros):

- Allows for spontaneous discussion from staff.
- Not siloed by department or dependent on creating links to discussion (scheduled meetings)
- Encourages creation and involvement in wisdom circles by staff and management
- Allows staff to be heard and directly involved in the creation of solutions to their issues.
- Facilitates dissemination, adoption and implementation of solutions.

Analysis (Cons):

- Requires commitment of resources (people, process & technology) by an agency to allow employees access.
- System needs to be custom created versus an off-the-shelf system.

SOLUTION

TelePortal offers the best balance of access for employees, collaboration and ease of entry. While the fact that the system needs to be created could be viewed as a detriment, it is in fact an asset. Having a system built to fit means that the requirements staff, processes and technologies can be accounted for and incorporated to obtain the best outcome. Owning the system outright means the state won't be obligated to pay for expensive licenses, only provide a home for it to live. A state-owned system that is hosted internally provides a reassurance that staff's involvement is truly work related and not just "wasting time online". Providing internal support and hosting TelePortal shows dedication to seeing the concept of telework and the employees utilizing it thrive.

IMPLEMENTATION PLAN

INCENTIVES

Net benefits to all participants regardless of level include:

- Increased access to peer-to-peer support for concerns regarding telework
- Access to additional/new resources that may not have previously been available
- Opportunities for collaboration with both peers and management across state service
- Exposure to the wisdom circle concept of mentorship where staff can mentor and problem-solve with one another and the engagement of management
- Increased employee satisfaction due to having an opportunity to be heard and involved
- Increased retention and productivity due to potential greater access to telework

> *As you both, John, you were talking about telework, Stephanie, you're talking about being that flexibility. What comes to mind for me is that model, that agile development model from the software world that I think is now applying to all of us and to how we're working.*
>
> -Meredith Williams, DTSC
> Leadership Forum Presentation – February 3, 2022

One main incentive to the workforce of the state by adopting teleworking and providing support to staff in finding solutions to teleworking is the shift to becoming an agile workforce.

Specifically to TeleTeam, twenty-plus state employees participated in the Hackathon to develop additional information related to this project. A repeated call from the staff was for consistency, transparency and equity in telework access.

As noted above, having access to a system like TelePortal provides collaboration which opens the door to information from other agencies to see how telework is being utilized.

For managers and telework coordinators, the system presents a new option for collaborating and obtaining information to help them make better decisions regarding teleworking for their staff and programs. Being able to engage with line-level staff and see their ideas in real time provides the chance to see telework at work and see how employees can flourish when given the right tools. This platform proposes to reduce rework caused by lack of information; managers will be granted with more efficient staff asking fewer questions and more time for themselves due to having answers at the ready.

EMPLOYER OF CHOICE:

The biggest benefit to the State of California is in becoming an employer of choice. Consistent and uniform application of telework policies spurred on by access to quality information and collaboration helps generate well-informed decisions. Increased access to telework resources, an opportunity for staff to be heard and respected, staff opportunities for working collaboratively outside of silos (while teleworking), increased productivity to staff and management and providing coordinators the ability to workshop and get feedback on changes to policy or procedure all lead to the state becoming an employer of choice.

RESOURCES

For deployment of the TelePortal to succeed, the project will require the following hard (tangible, i.e. technology, staff, etc.) resources:

Financial support to build the system (cost unknown).

- Cost for subscription to various business news websites to provide portal content (aka Telework Toolkit)
- Cost to hire needed contracting staff (IT, programmers, etc.)
- Facilitates dissemination, adoption and implementation of solutions.

Staffing

- Project manager to guide the project
- Facilitators to guide discussions and keep topics friendly and informative
- IT Administrator commitment to grant access, ensure security, etc.
    - Additional IT Admin support for system
- Telework Coordinator commitment to utilize system
- Dedicated programmer to integrate system into SACNet
- Executive/Middle Management commitment to utilize system
- Staff commitment to create portal content

Staffing Support

- Staff commitment to create walkthroughs (basic training information)
- Staff commitment to create support documentation (Troubleshooting)
  IT to build the system

IT infrastructure to host system

IT infrastructure to support system

Soft resource (portal content, time commitments, engagement, etc.) requirements:

Staffing

- Executive/Middle Manager commitment to utilize/engage with system
- IT Administrator commitment to support system uptime
- Staff commitment to create portal contents
- Staff commitment to create procedures
- Staff/Manager commitment to facilitate board
- Staff commitment to searching for financial resources
    - o   Grant funding from State?
    - o   Grant funding from Federal government?
    - o   Public/Private Partnership (PPP)

Procedures

- FAQ for TelePortal
- FAQ for Telework
- Manager/Supervisor Guidelines

Telework Toolkit

- State telework resources: telework.govops.ca.gov | California's Telework Guide, Statewide Telework (ca.gov), Statewide Telework Policy Memo, Telework | GSA, Resources for Managing Teleworkers | GSA
- Telework Ergonomics Information: Ergonomics and Remote Work | UCSF Health Ergonomics

User Agreements

Training/Support

PLANNING

Proof of Concept (Pock) proposals:
- System test build to show viability

Proof of Concept (Pock) Tests:
- Wisdom circle test meeting (May/June 2022)
    - o Held on May 18, 2022

Steps/Processes Being Tested as Pock:
- Wisdom Circle

ORGANIZATIONAL CHANGE MANAGEMENT (OCM)
(AKA PUBLICIZING THE SYSTEM)

TeleTeam proposes that the system be involved in department and agency-wide OCM messaging efforts to encourage engagement. Users can't access a system that they don't know about. Once there is ample engagement, OCM messaging should turn to relaying successes such as:

- Validated Answers
- Satisfied Users (via survey feedback)
- Success Stories (aka problems solved)
- Mentoring/Wisdom Circle Participation (infographic)
- Innovator Badge on System for Having Idea Adopted

WISDOM CIRCLE PROOF OF CONCEPT FEEDBACK

TeleTeam completed a Proof of Concept trial session of a wisdom circle in mid-May. The purpose of doing this trial is two-fold:

- Assists TeleTeam to see the benefit of building Teleportal to encourage the Wisdom Circle of communication as the model for participants.
- Offers the opportunity for staff to learn tools that they can use in their work.

The Proof of Concept event allowed TeleTeam to trial the Wisdom Circle method of communication through the lens of telework-related questions posed to a group of approximately 20 people. The feedback/information gleaned from this event has been uploaded as an addendum "Use Case" to this document and satisfies the deliverable requirement for this Proof of Concept.

LEARNING MANAGEMENT SYSTEM USE CASE

As a part of Cohort 2022, TeleTeam completed the CalHR Engage Values System course. The CalHR Values System consists of 9 core values:

1 ——————— Communicate Effectively

2 ——————— Inspire & Engage

3 ——————— Develop Others

4 ——————— Foster a Team Environment

5 ——————— Exhibit Personal Credibility

6 ——————— Build Collaborative Relationships

7 ——————— Improve Our Organization

8 ——————— Achieve Results

9 ——————— Model Good Governance

Each week, an email would be created that summed up the content of the video and elaborated on just how the value was impactful. A set of questions was posed to the team as a whole to consider and were discussed during team meetings. This review, repose, revisit method helped to drive home the content of the videos, incorporate the values into our work as a team and allowed for an interactive element that encouraged collaboration and communication.

The emails were turned into a Use Case document in May 2022 and have been uploaded as an addendum to this document to be included for future cohorts.

Proposed/Actual Deliverables (Responsible Parties in Bold):
- Deployment Plan (actual)–**TeleTeam**–The deployment plan for TelePortal along with a summary for use in executive meetings.
- User Agreement Information (actual)–**TeleTeam**–Cleaned/Organized output from Hackathon for reference when creating user agreements.
- Telework Toolkit (actual)–**TeleTeam**–Useful links to include in TelePortal consisting of resources for teleworking, ergonomics and management of teleworkers.
- Wisdom Circle Lessons Learned (proposed)–**TeleTeam**–List of problems generated by wisdom circle meeting and any solutions discovered.
    o   Wisdom Circle Information Kit - Docs from Michelle, Video, Transcript, Attendee Output
- Hackathon Results (actual) –**TeleTeam**– Raw output from Hackathon.
- Day of Innovation Presentations (actual) –**TeleTeam**–TeleTeam 3-minute presentation, Deployment Plan, etc.

Deliverables Accountability
- Deployment Plan – May 16, 2022 – Final
- User Agreement Information – June 9, 2022 – Final
- Telework Toolkit – June 9, 2022 (incorporated into Deployment Plan)
- Wisdom Circle Lessons Learned – June 9, 2022 (PoC)
    o   Wisdom Circle Information Kit - June 9, 2022
- Hackathon Results – April 14, 2022
- Day of Innovation Presentations – June 9, 2022

Metrics
- User Access Percentage (Users Committed/Users Accessing per week) (Goal: 20%/week @ 3 mos.)
    o   Measure Group Usage vs. Other Groups (ex: line-staff vs. managers, etc.)
- Number of Threads Posted (per week) (Goal: 5 per week @ 3 mos.)
- Number of Answers Validated by Management/Telework Coordinators (per month) (Goal: 1 per month @ 6 mos.)
- Return on Investment – Cost ($ Invested in Project Amortized Over Total Users)
- Return on Investment – Value (Increased Productivity as Measured by Survey to Management of Teleworkers Using System @ 3/6 mos.)
- User Satisfaction Survey Results (Goal: 70% satisfied @ 3/6 mos.)

TeleTeam

RECOGNITION

The TeleTeam would like to take the time to thank our hackers for joining us at the Hackathon on April 14, 2022. Without their key contributions, this deployment plan would not have been possible. The hackers below are listed in alphabetical order:

- ⭐ Aneesah Al-Mohsen, DMV
- ⭐ David Angulo, DMV
- ⭐ Jennifer Black, DTSC
- ⭐ Candy Craft, DMV
- ⭐ Krissy Chan, DWR
- ⭐ Regina Fisher, DMV
- ⭐ Molly McClure, SCO
- ⭐ Elsa Montenegro, DWR
- ⭐ Sunnie S-Munar, SCO
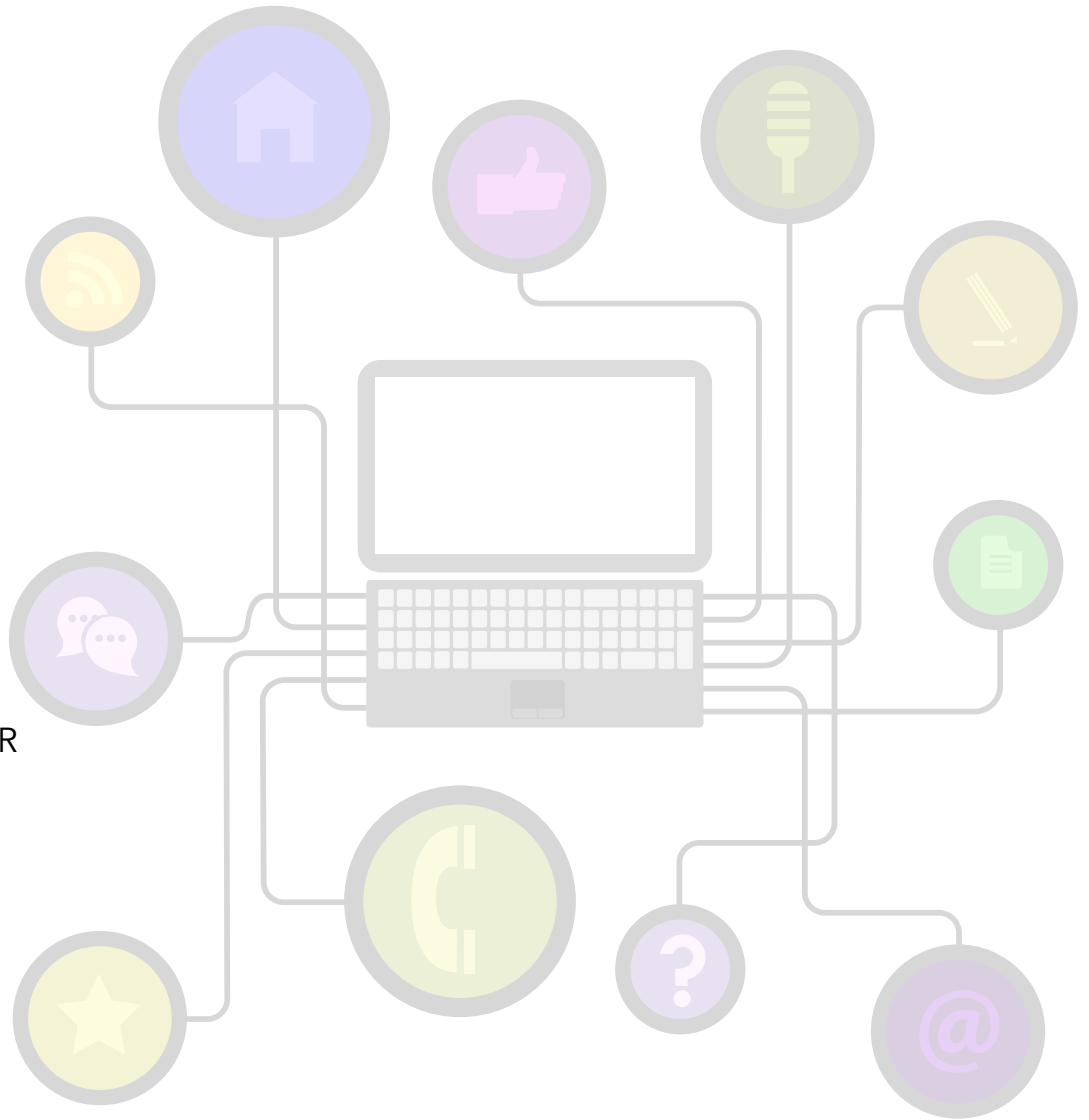- ⭐ Javier Ochoa, DMV
- ⭐ Jackie Pace, DMV
- ⭐ Katina Smith, DMV
- ⭐ Vina Uy, DMV
- ⭐ Ken Wohl, DCSS

QUESTIONS

FOR COHORT 2023 & BEYOND
TO CONSIDER:

- How will we identify/obtain funding?
- How will we identify/obtain technological support?
- How do we get state agency buy-in?
- How do we budget forecasting for this project?
- What technological skillsets do we need for this project?
- What steps can we take to find funding/tech support?
- Who would create training and support documentation?
- How do we incorporate continuous improvement into the platform?

CITATIONS

McCallum, J. S., McCallum, J. S., & Bio, V. (2015, December 17). Adapt or Die. Ivey Business Journal. Retrieved April 21, 2022, from https://iveybusinessjournal.com/publication/adapt-or-die/

Danzyk, P., Barranco, A., Gordon, S., Sanborn, J., Tom, S., Williams, M., & Xavier, J. (2022, February 3). *Accelerating Government Innovation Through a Culture of Change Leadership Panel.* Cal-IPGCA Leadership Forum. Retrieved April 21, 2022, from https://orasystems.tovuti.io/images/yvHjfMVGXF0l2hlXTVVunDMjI5NzY4ODE4MzI5NA/ORA_ASSETS/Transcript_-_Change_Leadership_Panel.pdf