Remote Workforce Policy Development

Brittany Swett, Executive Director, J&J Editorial LLC

- Balance between in office and remote work
- Longstanding history
- Codified in employee handbook
- Flexibility balanced against responsibility
- Manager oversight
- Standard hours and communication required

J&J Editorial recognizes that working from home provides flexibility and enriches the work-life balance of its employees. However, working from home also comes with a certain level of accountability and responsibility required from its employees. Working from home is a benefit, not a right of employment. It is contingent on favorable work performance and manager approval.

- J&J Editorial Employee Handbook, 2018
Assessment of Organization and Staff

- Why? Who or what is driving remote work option and policy?
- Who are your employees? Millennials? Parents returning to the work force?
- Will your ideal job candidate theoretically thrive in a remote workforce?
- Already part of culture or a complete shift?
- Are your hiring needs stable/steady (replacement) or high (growing organization)?

Gather Data
- HR statistics and trends
- Employee survey
- Exit interviews
- Market forces and accepted workplace characteristics in your industry and area

Pros and Cons of Remote Work

Snapshot of Top Benefits and Concerns

- Reduce overhead/bills
- Might increase retention rates
- Could increase productivity
- Could decrease PTO/sick time
- Hire outside your geographic location, ie, pull from larger talent pool
- Cover more time zones for clients
- Could increase employee loyalty to company
- Appealing to Millennials – next generation of workers
- Could increase management time
- Could increase time for teams to make decisions “collaborative efficiency”
- More difficult to identify low performers
- Have to get creative to foster collaboration / drive innovation
- More difficult to foster a company-wide culture
- Loss of informal knowledge sharing
- Can make mentoring difficult

Millennials

- Collaboration
- Technology
- Mission/makes/culture
- Work-life flexibility
### Considerations When Developing a Policy

- Financial implications
- HR considerations
- Hiring
- Culture
- Management / enforcement
- Operational considerations
- Who will be eligible? Equity versus equality
- Technology, IT, and information security
- Payroll vendor

### Financial Considerations

- Income tax requirements vary by state. Integrate various deadlines, withholdings, and tax rates with your payroll vendor or staff.
- What geographic area is acceptable for having employees?
  - International employees? Are you willing to sponsor a visa?
- What physical resources do you need to invest in/divest of?
- How will a new policy impact your organizational annual budget?

### Human Resources Considerations

- Health care for remote employees in different states
  - How does this impact participation requirements or state-specific insurance regulations?
  - Will you need to adjust to subsidizing employees’ individually purchased health care plan instead of offering a group plan?
- Fair Labor Standards Act and State Departments of Labor
  - Check state wage and hour laws regarding record keeping, overtime, exemptions, pay frequency, and pay statements.
- It’s complicated! Get input from an HR expert.

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**Source:** Flexjobs. From [https://www.flexjobs.com/blog/post/infographic-which-states-have-most-full-time-telecommuters/](https://www.flexjobs.com/blog/post/infographic-which-states-have-most-full-time-telecommuters/).
Developing a Policy

- What’s the goal?
- Input from legal and HR?
- Write the policy – use simple, direct language
- Review the language of the policy to make sure it will make sense to employees
- Final review by legal, HR, and senior management
- Communicate it to managers (aka, the enforcers) for feedback
- Communicate it to staff and implement

Thank You

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7.3 MANAGING THE UNIQUE CHALLENGES OF A REMOTE EDITORIAL OFFICE:

NAVIGATING A BLENDED WORKFORCE

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CSE ANNUAL MEETING 2018
MAY 8, 2018
ABOUT ME

Full-Time (2007)
1 Day Remote (2009)
2 Days Remote (2012)
Full-Time Remote (2014)

JBJS, INC. JOURNALS PORTFOLIO

• The Journal of Bone & Joint Surgery
• JBJS Case Connector
• JBJS Essential Surgical Techniques
• JBJS Reviews
• JBJS Open Access
• JBJS Journal of Orthopaedics for Physician Assistants

2,200+ submissions each year

JBJS TELECOMMUTING POLICY (2016)

• Written approval needed
• At least 1 year at company
• Set schedule (occasional changes allowed)
• Should not interfere with work duties
• Overall remote-friendly workplace
EDITORIAL DEPARTMENT

STRUCTURE

2007
• 1 In-House Manager
• 2 In-House Assistants
• 1 In-House Editor-in-Chief

Early 2012
• 1 In-House Manager
• 1 In-House Coordinator
• 2 In-House Assistants
• 1 Remote Editor-in-Chief

Late 2012
• 1 In-House Manager
• 1 In-House Coordinator
• 1 Remote Managing Editor
• 3 Remote Assistants
• 1 Remote Editor-in-Chief

2018
• 1 Remote Manager
• 1 In-House Manager
• 1 Remote Coordinator (1 day remote/week)
• 1 Remote Managing Editor
• 6 Remote Assistants
• 1 Remote Editor-in-Chief

STAFF SCHEDULE

• Google Calendar

MASTER TASK LIST

• Description, owner, alternate back-up
• Majority of JBJS manuscripts processed by KWF
COMMUNICATION

- Manager Calls
- Group Calls
- Methods
- Instant Messages
- Stand-up Meetings
- Emails
- Shared Drive

SHARED DRIVE

- Central place for notes, protocols, forms
- Convenient, web-based, easy to access
- Anyone can edit

SHARED DRIVE CONT.

- Google Drive

  - My Drive
  - Shared
  - Trash
  - Trash - shared
  - Recent
  - Company info
  - Meetings
  - Templates
  - Company info
  - Meeting rooms
  - Meetings
  - Templates

- My Drive
**COMMUNICATION**

- **Manager Calls**
- **Group Calls**
- **Stand-up Meetings**
- **Emails**
- **Instant Messages**
- **Shared Drive**
- **Methods**

**EMAILS**

- JBJS.org addresses for everyone
- Accessible via browser
- Day-to-day queries to/from editors, staff, authors, reviewers
- Communicate policy changes
- Checked frequently

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**SHARED DRIVE CONT.**

**JBJS**

**EMAILS**

- JBJS.org addresses for everyone
- Accessible via browser
- Day-to-day queries to/from editors, staff, authors, reviewers
- Communicate policy changes
- Checked frequently
COMMUNICATION

Manager Calls
Group Calls
Stand-up Meetings
Instant Messages
Emails
Shared Drive
Methods

INSTANT MESSAGING

• All team members
• Quick questions
• Last-minute updates
• Side notes
• Also used with other departments

COMMUNICATION
STAND-UP MEETINGS

- Daily in-house check-in
- Format:
  - Yesterday:
  - Today:
  - Need:
  - Usually less than 2 minutes

COMMUNICATION

GROUP CALLS

- Once per month
- Agenda posted beforehand
  - Question of the day
  - Status updates
  - Follow-up items
  - Protocol/policy changes
  - Company updates
  - Upcoming availability
- Minutes available afterward
- 1 hour (usually 30 min)
COMMUNICATION

Manager Calls
Shared Drive
Emails
Instant Messages
Stand-up Meetings
Group Calls

COMMUNICATION

MANAGER CALLS

Remote Managing Editor
Remote Manager
In-House Coordinator

- Touch base once per month
- Training, hours, special projects, issues
- 30 minutes or less
BUT WAIT, THERE’S MORE

• Additional factors to consider:
  • New staff training
  • Cross training
  • Updating documentation/reviewing old policies

AND SOME MORE

• Weekly director calls
• Monthly all staff meetings (dial-in)
• Monthly publishing department meetings (dial-in)
• Bi-monthly office visits
• Meetings, workshops, conferences

BENEFITS OF A BLENDED WORKFORCE

• Turnover and staff training → handled externally
• Different work calendar → more availability
• Risk management → multiple people trained
• Qualified employees → more skilled
• More team members → diverse talents
• Better work/life balance → steady workforce
CHALLENGES

• Team buy-in
• Conveying company culture
• Gauging performance
• Last-minute tasks

TAKEAWAYS

• Have a central place to share information
• Keep in touch regularly and spontaneously
• Be open to change
Managing the Unique Challenges of a Remote Editorial Office

Monica Leigh | Senior Managing Editor
Monica.Leigh@kwfco.com

About KWF Editorial, About me

• KWF provides an entire or any part of an editorial office for scholarly societies and journals
• We don’t have a brick-and-mortar office; we all work remotely
• 50+ employees, 10+ MEs, 25+ journals
• Joined KWF in 2011
• 5 years managing virtually

The benefits & challenges of working from home

- **No commute**
  - No rush hour traffic to battle

- **Comfortable wardrobe**
  - No dry cleaning bills

- **Flexible schedule**
  - Walk the dog at lunch

- **Organization & focus**
  - Not getting distracted by household & family demands
The challenges of managing a remote workforce

- Possibly never meeting your co-workers face to face
- Feeling isolated; developing relationships and social camaraderie
- Interviewing, hiring, and training remotely
- Keeping if an employee showed up to work if you can’t see them at their desk
- Providing constructive criticism and feedback without body language
- Managing multiple people working across multiple projects on a 24-hour schedule

Google Drive for file sharing

- Using online tools for time & task tracking, performance indicators, and accountability

“See” who is working and when

Possible a sense of community

Communication tool & work tracker

Productivity analysis to measure project, individual, team goals
Sample work tracker

Sample training materials
Don’t just say what to do; show how to do it

Start by checking for any | Yes | see the Manuscript Notes panel | | check the Manuscript Notes on the Details page (C1 Details) for any messages.

Sample training materials
Pair detailed instructions with quick-reference checklists

<table>
<thead>
<tr>
<th>Single-column format</th>
<th>Creator script</th>
<th>Continuous-line numbering</th>
<th>Abstract</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Developing trust & rapport with staff

- Daily interaction through online tools
- Daily emailed task reports
- Regular feedback from manager & scheduled check-in calls
- Seasonal photo or article sharing & birthday wishes
- Annual performance review

Sample daily report (via email)

KWF Daily Report

Subject line: Sara’s Daily Report 5/8/18

Tasks completed: 18 new submissions, 8 revisions
Average time/task: 8 mins (new), 11 mins (revised)
Scheduled hours: 8am-12pm
Hours worked: 8:15am-12:15pm
Reason for any difference: kids missed bus, had to drive them to school
Notes: submission system was slow to load today; was it for you too?
Comments: Have a good weekend!

Sample productivity tracker (manager)

<table>
<thead>
<tr>
<th>Task Type</th>
<th>PRA</th>
<th>Indiv Average</th>
<th>Team Average</th>
<th>Notes</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Handling Inbox</td>
<td>PRA 1</td>
<td>0.0734</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Handling Inbox</td>
<td>PRA 2</td>
<td>0.0757</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Handling Inbox</td>
<td>PRA 3</td>
<td>0.0447</td>
<td>0.0646</td>
<td>New hire</td>
<td>10 mins</td>
</tr>
<tr>
<td>Submission Check (New)</td>
<td>PRA 1</td>
<td>0.0551</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submission Check (New)</td>
<td>PRA 2</td>
<td>0.0839</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submission Check (New)</td>
<td>PRA 3</td>
<td>0.1239</td>
<td>0.0910</td>
<td>New hire</td>
<td>15 mins</td>
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<tr>
<td>Submission Check (Revised)</td>
<td>PRA 1</td>
<td>0.0848</td>
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<td></td>
<td></td>
</tr>
<tr>
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<td>0.1248</td>
<td></td>
<td></td>
<td></td>
</tr>
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<td>Submission Check (Revised)</td>
<td>PRA 3</td>
<td>0.1123</td>
<td>0.1100</td>
<td>New hire</td>
<td>20 mins</td>
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</table>
Sample productivity tracker (individual)

<table>
<thead>
<tr>
<th>Task Type</th>
<th>Indiv Average</th>
<th>Team Average</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Handling Inbox</td>
<td>01:13:06</td>
<td>00:36:21</td>
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</tr>
<tr>
<td>Submission Check (New)</td>
<td>01:12:59</td>
<td>00:59:03</td>
<td></td>
</tr>
<tr>
<td>Submission Check (resub)</td>
<td>00:08:39</td>
<td>00:06:43</td>
<td></td>
</tr>
<tr>
<td>Submission Check (Revised)</td>
<td>01:11:00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submission Check (resub-Revised)</td>
<td>00:06:15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Untracked time</td>
<td>12%</td>
<td>5%</td>
<td>Goal: &lt;10%</td>
</tr>
</tbody>
</table>

Sample performance review

<table>
<thead>
<tr>
<th>Task</th>
<th>IAME</th>
<th>UNDERSTANDING</th>
<th>PERFORMANCE</th>
<th>EVALUATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication Skills</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
</tr>
<tr>
<td>Teamwork</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
</tr>
<tr>
<td>Technical Skills</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
</tr>
<tr>
<td>Leadership Skills</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
</tr>
<tr>
<td>Overall Competence</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
</tr>
</tbody>
</table>

Sample performance review

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
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<tr>
<td>Quality Control</td>
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<td></td>
</tr>
<tr>
<td>Communication Skills</td>
<td>5.0</td>
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<tr>
<td>Technical Skills</td>
<td>5.0</td>
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<tr>
<td>Leadership Skills</td>
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</table>

Enhanced Highlights:
- [Task] has demonstrated exceptional performance in [Skill] and [Skill].
- [Task] has improved in [Skill] and [Skill] through [Practice].
- [Task] has received positive feedback from [Client/Manager] for [Performance].

Future Development Opportunities:
- [Task] could benefit from further training in [Skill] to enhance [Competence].
- [Task] should consider [Activity] to improve [Skill] and [Skill].
- [Task] should continue to develop [Skill] to achieve [Goal].
Performance management documentation

• Document all issues clearly with email including sending follow-up email correspondence for any issue discussed on a one-on-one phone call.

• Save all non-general correspondence, including correspondence related to attendance/scheduling, to an individual file in Outlook for each member of your team.

Performance coaching

• **Emails:** For specific things that need to be addressed immediately or immediate praise.

  • “Thanks for…”
  • “I’ve noticed that” [issue]
  • “Please” [desired behavior]
  • “Thanks again for” [attention to this issue/all of the good work, etc.]

  *Try and avoid the pronoun “you” when possible. (It’s like virtually pointing a finger.)*
  *Make it more about the work process rather than about the person.*
  *Never assume why someone may be having performance issues. Stick to facts.*

• **Phone calls:** For trends, discussion about improvement, training, and explaining process. Also for pointing out points of achievement.

  • If trends are noticed, try to schedule a call to discuss. Pointing out several errors at once over email can seem overwhelming. This will also help formal performance calls be shorter and run smoothly.
  • Use a call to explain the why in a process when needed, followed up by email.

  *Same conversation skills are true via phone…*
  *Try to avoid the pronoun “you” when possible. (It’s like virtually pointing a finger.)*
  *Make it more about the work process rather than about the person.*
  *Never assume why someone may be having performance issues. Stick to facts.*
Managerial best practices

- Be accessible; answer same-day emails and schedule regular calls
- Provide robust online materials, tools, and support
- Make goals measurable, give feedback to meet them, allow time to improve
- Praise successes & share needs for improvement with ample documentation
- Be transparent & consistent; it develops trust
- Welcome employee feedback about workflow efficiencies & suggestions for improvement
- Close the loop, make sure questions are answered

2018 CSE ANNUAL MEETING
PUBLISHING
IN THE CHANGING CLIMATE OF THE RESEARCH ECOSYSTEM
WWW.COUNCILSCIENCESEDITORS.ORG
MAY 5-9, 2018
NEW ORLEANS, LA

Brittany Swett
• Executive Director, JMJ Editorial LLC
Christina Nelson
• Editorial Operations Manager, JBJS
Monica Leigh
• Senior Managing Editor, KWF Editorial
Moderator:
• Erin McMullan, KWF Editorial

Concurrent 7.3: Managing the Unique Challenges of a Remote Editorial Office
#CSE2018