

“We Couldn’t Keep Doing Things the Way We’d Done Them”

University and County Human Service Agency Experiences
of the COVID-19 Pandemic and Strategies for the Future

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INTRODUCTION

Over the last three years, the COVID-19 pandemic has challenged universities and county human service agencies in unprecedented ways while magnifying existing inequities across the globe. Students, faculty, staff, and clients experienced profound losses and disruptions to daily life while continuing to provide critical services, care for loved ones, and engage in online and hybrid learning.

In California, concurrent climate-fueled heatwaves and devastating fires have swept across the state, requiring many residents to manage rolling power outages, evacuations, and community loss. In the summer of 2020, the police murder of George Floyd catalyzed widespread racial justice protests in tandem with the Movement for Black Lives. The increased national focus on longstanding racial injustices within the United States changed the ways universities and agencies approached conversations regarding Diversity, Equity, Inclusion, and Belonging (DEIB), and pushed many sectors to examine their own roles in upholding and perpetuating systemic racism.

Individuals and communities continued to grapple with the impact of racialized violence, mass shootings, and loss in the midst of the ongoing impacts of the pandemic on health and well-being. In addition, the far-reaching economic impacts of the pandemic coupled with the large-scale shift to remote work began to create cultural shifts in the organization of labor relations in the national economy. These interwoven experiences have served to intensify and complicate the experiences of the COVID-19 pandemic in California and across the world.

In the midst of these upheavals, all sectors have navigated complex, and sometimes conflicting, community priorities and needs while faced with

incomplete and rapidly shifting public health information. While the sustained impact on individuals and communities cannot be understated, the pandemic has necessitated flexibility, cooperation, and rapid innovation throughout all sectors. Across California and within the Bay Area, university and agency partners involved with the California Social Work Education Center (CalSWEC) and the Bay Area Social Services Consortium (BASSC) met frequently to share their experiences, co-create strategies to meet community needs, and engage in constructive dialogue regarding existing practices and future directions.

This report is an effort to synthesize information from these sessions, including lessons learned, remaining questions, and potential strategies for the future.

WHO WE ARE

The California Social Work Education Center (CalSWEC) and the Bay Area Social Services Consortium (BASSC) have partnered to capture critical insights from this moment in time. CalSWEC, founded in 1990 by UC Berkeley Social Welfare faculty, is the nation's largest statewide coalition of social work educators and practitioners. CalSWEC provides statewide leadership and support to educate and train culturally responsive social workers with a specific focus on public child welfare,

integrated behavioral health, and aging and adult services. In response to the pressing concerns engendered by the pandemic, CalSWEC's Advisory Board's Capacity Building & Planning Committee developed the COVID 2.0 Ad Hoc Committee in the spring of 2021 to collectively strategize recommendations for campuses and agencies continuing to navigate an uncertain landscape.

BASSC, founded in 1987 and located within the UC Berkeley School of Social Welfare, is an agency-university partnership that engages in research, workforce development, and policy analysis and development to strengthen public sector human services in the San Francisco Bay Area. In collaboration with agency and university partners, BASSC research and programs aim to expand the workforce capacity and knowledge base of public sector human service agencies while providing consistent platforms for cross-county information sharing and regional initiatives.

In 2020, BASSC rapidly shifted the focus of its workforce development programming for county human service agencies, developing Critical Information Exchange (CIE) sessions to support agency staff as they navigated the impacts of the public health emergency and concurrent environmental disaster response demands.

PURPOSE

In the midst of this national crisis, the mission of both CalSWEC and BASSC has been to facilitate county and statewide partnerships supportive of collaboration and resource sharing. The parallel forums of the CalSWEC COVID 2.0 Ad Hoc Committee and the BASSC CIE sessions chronicled stakeholder experiences and offered many opportunities for cross-system learning. The partnership between CalSWEC's statewide and BASSC's regional focus has also provided rich context for centering shared experiences and spotlighting opportunities for future development. Through this synthesis, CalSWEC and BASSC aim to document insights and strategies gained in these collaborative sessions and share them in a way that supports practical use and future planning.

METHODS

This synthesis is informed by data collected from: 1) CalSWEC Advisory Board and Capacity Building & Planning Committee meeting minutes, 2) CalSWEC COVID 2.0 Ad Hoc committee meeting minutes, 3) coded Zoom transcripts and meeting minutes from BASSC CIE sessions, 4) BASSC county partner presentations, 5) key informant interviews with CalSWEC university and county human service agency partners, and 6) iterative feedback from both CalSWEC and BASSC university and agency stakeholders. This report summarizes central themes and commonalities found across these discussions while highlighting innovative strategies and enduring questions proposed by university and agency partners.



PART I: THE CALSWEC COVID 2.0 AD HOC COMMITTEE DISCUSSIONS

In a series of committee forums and key informant interviews, members of the CalSWEC COVID 2.0 Ad Hoc Committee met to discuss pressing challenges and concerns regarding the impacts of the COVID-19 pandemic.

Impacts were grouped into four focus areas:

1. Social Work Education Impacts
2. Field Placement Impacts
3. Workforce Impacts
4. Diversity, Equity, and Inclusion

These conversations were designed to capture real-time experiences of the COVID-19 pandemic and identify ongoing concerns with a central focus on equity. Below are detailed examples of challenges and lessons learned from these exchanges.

SOCIAL WORK EDUCATION IMPACTS

In a “high touch” field such as social work, the rapid shift to online educational and field placement contexts presented a unique challenge for social work education. Beginning with statewide shelter-in-place directives and continuing into the present, students, faculty, and staff have experienced wide-ranging and disparate personal and institutional challenges.

Impact on Students

“Some of our students who were the least resourced were taking care of the most family. They were also really showing up with respect to health disparities.” – University Leader

The full impact of COVID-19 on student well-being and preparedness to practice in the field of social

welfare is still being revealed. For many students, the impacts of the pandemic were compounded by the intersection of their identities, experiences, and responsibilities inside and outside of their social work programs. Some common themes across the state include:

- Universities reported wide socioeconomic disparities in student access to technical support such as high-performance laptops with video capabilities and consistent wireless connections. These challenges were heightened in rural communities with more limited technology infrastructure.
- Many students did not have access to quiet, remote learning spaces conducive to learning.
- Many students experienced profound losses, including the death and illness of loved ones. These losses disproportionately impacted Black, Indigenous, and People of Color (BIPOC) students and mirrored wider national health inequities and systemic barriers to disease prevention and care.
- Student parents and caregivers experienced significant disruptions to their schedules as they were often responsible for providing care and educational supports at home.
- Many students lost their jobs as a result of the pandemic, including students who were the primary income earners of their households. These losses resulted in heightened economic insecurity, and in some cases, the inability to meet basic needs.

- Coinciding national racial injustices and local fire emergencies deeply impacted student well-being and heightened needs for community support.
- Students experienced challenges to physical and mental health exacerbated by the ongoing uncertainty of the pandemic. Faculty members reported an increase in students requesting disability accommodations and an increase in student reports of anxiety-related mental health concerns.
- Building cohorts and a sense of community in the context of remote instruction and interactions remained challenging for many.
- As schools began to transition to in-person learning, students with disabilities and immunocompromised students faced disproportionate barriers to full participation in classes.



Impact on Instruction

“Pivoting classes to a virtual model was difficult for many faculty...I already had been teaching in [an online program] for several years, so Zoom wasn’t a scary platform for me...I know many of my colleagues did not have that experience.”

– University Leader

“The university asked to have people come back on campus, but there were no food vendors open...there was nobody unlocking the classrooms...the infrastructure of the university was not prepared to have people back on campus...I spent most of my time doing building maintenance. Like, ‘can you come open these doors?’”

– University Leader

As a result of the pandemic, many faculty were teaching in an online environment for the first time. While some universities with existing online programs were prepared to transition to remote learning, most faculty and students were learning to adjust in real-time. Some common themes across the state include:

- Resources and training materials to support faculty in developing online instruction methodologies were unevenly distributed.
- Many schools lacked accreditation for online instruction.
- Most existing curriculum was not designed to train students for the rapid expansion of telehealth services and stakeholders identified a remaining need to develop new key competencies to prepare future providers with skill sets specific to virtual and hybrid service delivery.
- Students had limited opportunities to practice and roleplay direct practice situations.
- Students and faculty experienced widespread “Zoom fatigue” and challenges to sustained

learning within traditional class schedules designed for in-person instruction blocks.

- As students and faculty transitioned back to in-person learning across the state, many campuses were not fully prepared to support the transition which resulted in logistical challenges such as a lack of adequate food services available for students on campus and building maintenance gaps.
- Without cohort building across school years, there has been a loss of historical knowledge and a heightened learning curve for students navigating student life, including approaches to developing affinity groups, hosting educational events, and accessing services.

FIELD PLACEMENT IMPACTS

“Initially we got a whole bunch of pushback, like no, no, they have to come to field....one of the really big challenges was both internally figuring out what we were going to do, and then working with our partners to figure out a plan so that students retained as many of the learning opportunities that they were still hoping for.”

– University Leader

Field placements play a central role in social work education programs and support students to build their skills with the supervision and guidance of off-site faculty and on-site professionals in the field. All accredited social work programs require field placements, and some student placements are part of specialized training programs that include a post-graduation employment obligation as one of the terms for receiving stipends and/or education cost reimbursements. At the beginning of shelter-in-place directives, all universities shifted to remote placement policies for students. In most instances, universities made this decision before agencies began shifting to remote work for eligible positions, which sometimes created tension. As many universities continue to shift to in-person or hybrid



field placements, varying policies and expectations persist. Common themes regarding field placement impacts include:

- Agency guidelines for in-person work vary widely and present a significant administrative burden for university staff to navigate in consultation with legal and public health entities.
- Some agencies required in-person field placements while university remote field placement directives were still in place which required program departments to apply for special exemptions to university-wide policies.
- Many student interns did not have access to remote work areas that provided needed privacy for telehealth services.
- The long-term impact of remote field placements on students’ preparedness for social welfare careers remains unclear.

WORKFORCE IMPACTS

“We are in the ‘great resignation’...and we can’t pay as well as other places...one of our employees had been laid off from her [corporate employer] and they called her back at three times the salary rate that we could offer.”

– University Leader

“We have made all the staff come back face-to-face because it is based on department operations and a lot of people have gotten jobs where they don’t have to...I think [we’re] trying to continue to support people and be as empathetic and flexible as possible.”

– University Leader

Agencies and campuses have experienced workforce impacts that mirror many of the challenges experienced by students. For example:

- Differential opportunities to work remotely based upon position highlighted equity concerns for staff (e.g. managers were more easily able to transition to remote work while frontline staff often continued to provide essential services in person while managing associated health risks and logistical burdens).
- Employees were required to navigate health and safety concerns, especially higher risk and immunocompromised staff and/or staff living with and caring for at-risk family and community members.
- Parents and primary caregivers experienced increased stressors related to loss of child care, supporting at-home learning, and fluctuating school schedules.
- Agencies and universities were required to develop responses to vaccine mandates and create corresponding documentation systems.
- Agency, university, and county telehealth and telework policies varied widely and needed to be

negotiated within agencies, bargaining units, and departments.

- Universities and human service agencies across the state and country are navigating the impacts of the “great resignation” and many sectors are experiencing staffing shortages as employees re-examine career and life needs and goals. Universities and agencies are also experiencing increased competition for employees from private sector companies able to offer greater compensation and remote work flexibility.
- An increase in working from home has resulted in a blurring of boundaries between work and home life for many staff members which often heightens feelings of burnout and overwhelm.

DIVERSITY, EQUITY, AND INCLUSION

First and foremost, [there are] racial, gender, and resource differences. [We needed] some sensitivity to the fact that some of our students were actually the main support of their entire families and that just put them in an entirely different realm in terms of how they function in school, how they managed with work or not having work. We had a lot of instances where people’s jobs got eliminated and we needed to provide additional financial support for [students].” – University Leader

The pandemic has had profound and lasting impacts on individuals and communities across the world. Within the United States, low-income, disabled, and BIPOC communities have experienced disproportionate loss of life, healthcare access barriers, care inequities, and increased economic insecurity. Furthermore, the national crises of police violence, systemic racism, and extreme economic inequality have intensified the experiences of the pandemic for millions. The CalSWEC discussions highlighted widespread inequities for BIPOC communities related to:



- Vaccine access
- Disease prevention and care
- Linguistically and culturally responsive public health information
- Loss of loved ones and family members

Stakeholders noted disparities in economic impacts on students, employees, and community members including:

- Job loss
- Financial caregiving responsibilities
- Food and housing insecurity
- Access to technology, internet connection, and quiet working spaces to support remote work and instruction

The pandemic also had a disproportionate impact on work and learning opportunities for:

- Caregivers and parents, especially women and single caregivers
- Individuals with disabilities and health conditions

Responding to these disparities is a central responsibility of universities and public human service agencies. The increased attention on systemic racism in the wake of widespread racial justice movements across the United States has shifted university and agency conversations surrounding DEIB. A heightened emphasis on addressing longstanding inequities within the field has also created new opportunities to evaluate the equity impacts of existing policies. Furthermore, there is

an increased need and emphasis on co-creating collaborative processes that center the experiences and perspectives of individuals and communities most impacted by programs and policies.

HIGHLIGHTING WHAT WORKED: STRATEGIES FOR THE FUTURE

“The thing that has served us the best is working to get rid of the ‘that’s not how we do it,’ mentality. We have to remind ourselves, ‘you’re right, that’s not how we’ve done it before, but we need to look at this differently now.’”
– University Leader

As departments, universities, agencies, and counties have navigated the ongoing impacts of the pandemic, they have generated an array of solutions and approaches to meet the evolving strengths and needs of staff, students, and clients. High-level themes include developing strategies to respond to immediate material needs, developing clear and consistent communication norms, centering flexibility and compassion, and maintaining positive developments into the future.



Increasing Educational Access and Equity

“[We were] not only developing policies but getting more educated about students with disabilities and making sure that we were accommodating them in ways that were best for them.” – University Leader

Despite its many challenges, the flexibility of online instruction and the reevaluation of hybrid policies has reduced barriers to social work education for many students. Examples of these critical improvements in educational access include:

- More first-generation and working students were able to continue their education while working full- and part-time.
- Many disabled students and students with chronic illnesses who had previously experienced systemic and institutional barriers to full participation in educational activities were able to attend classes, community events, and field placements remotely.
- Some parents and caregivers were able to attend classes and field placements more consistently given increased schedule flexibility and the ability to work from home.

Responding to Immediate Material Needs

“If you don’t have your health, it doesn’t matter. And if you can’t support people, it doesn’t matter.” – University Leader

“We quickly identified what are the programs that have to be done in person...and then what do we need to do to keep those people and those clients safe.” – Agency Leader

Despite budget limitations, counties, agencies, departments, and universities developed innovative strategies to meet the existing needs of students, staff, and clients. Solutions include:

- Social work departments partnered with wider university resources, applied for state and federal pandemic assistance funding, and developed internal fundraisers to supply students with technology equipment, Wi-Fi access, and short-term grants to supplement lost income.
- Agencies developed rapid strategies to supply staff and student interns with laptop and Wi-Fi resources needed to work remotely.
- Universities and agency supervisors partnered with students who did not have access to spaces conducive to remote learning and field placement activities on an individual basis to develop strategies supportive of remote work.

Clear and Consistent Communication

In a public health crisis in which available information changes daily, the need to communicate consistently and clearly across sectors has been essential.

Successful strategies for communication include:

- Regular meetings with leadership across all levels (including cross-county, within-county, inter-agency, intra-agency, consortiums, and councils)
- Regular supervisory meetings
- Surveys of staff, students, and clients regarding their experiences (optimally offered online, by phone, or on paper depending on respondents’ preferences and access needs)
- Community forums for staff and students to voice experiences and concerns
- Shared community spaces and book clubs, including spaces to discuss community experiences and responses to racial injustices
- When possible, partnering to develop cohesive decisions across similar organizations (e.g., universities partnering together to develop similar remote field placement policies to present to agencies)

Centering Flexibility and Compassion

“We’re looking at making sure that people are trained in leadership and the whole system of care comes from a place of flexibility and compassion across the board.” – Agency Leader

“We can’t create policies and procedures that are so rigid that in the event of something that you can’t even wrap your head around, you’re stuck, you’re trapped.” – Agency Leader

The emotional, physical, and logistical impacts of the pandemic on every individual, community, and institution are ongoing. As universities, departments, agencies, and counties grapple with retention and burnout and navigate persistent uncertainties, the need to respond to individuals with flexibility and compassion is more evident than ever. Many leaders and faculty shared that the last three years have challenged them to respond with much more flexibility and understanding than they might have in the past. Examples of these shifts include:

- An increased recognition that students and employees hold multiple roles and many times



assignment and work expectations can be adjusted to respond to immediate health, well-being, and/or caregiving needs.

- A push to develop policies and procedures that are clear, meet the needs of all parties, and are also flexible enough to adapt to unexpected circumstances.

Carrying Positive Education Impacts Forward

“We’ve had some amazing guest speakers [from around the world] because we were on zoom... So now, how do we preserve that and not lose that because we’re going back to the old way?” – University Leader

Although students and faculty experienced many challenges in remote learning and instruction, faculty and directors also reported positive impacts on student well-being and educational opportunities that they seek to carry forward. Common themes include:

- Reduced commutes lessened overall student stress, schedule constraints, and financial burden related to travel costs, especially in locations where students regularly commute 2+ hours per day.
- A shift to remote field placements yielded opportunities for students to learn and work within organizations previously inaccessible due to their geographic distance, including within state and national organizations. These positive effects were especially pronounced for students living in rural areas with few accessible field placement options.
- Remote instruction allowed professors to bring speakers from around the United States and the world to speak with classes.
- Students were able to attend previously inaccessible presentations by state and national speakers, lectures, lobbying events, and other forums online.

PART II: THE BASSC CRITICAL INFORMATION EXCHANGE SESSIONS

From July 2020 to October 2021, BASSC agency and university partners engaged in a series of Critical Information Exchange (CIE) sessions focused on the impacts of the COVID-19 pandemic and simultaneous natural disasters, related to the transition to remote work, ergonomic needs, performance management, and disaster response efforts.

Participants outlined persistent challenges across counties, provided example solutions, and generated questions in need of additional exploration. In addition, the BASSC team developed a synthesis of the existing research literature regarding the impact of remote work on employers and employees. These research findings, presented at a July 2020 CIE session, are provided in the appendix to this report.

DEVELOPING INFRASTRUCTURE TO SUPPORT REMOTE WORK

As local and state shelter-in-place directives triggered a rapid shift to remote work, agencies and universities were tasked with developing expeditious telework policies, information technology supports, ergonomic strategies, and methods to respond to client privacy and legal concerns. There was also a need to manage the physical and mental health impacts of the pandemic on employees and develop procedures for ongoing supervision and oversight. As more employees transition back to in-person or hybrid work, agencies and universities continue to develop systems to support in-person and hybrid productivity and well-being.

Agency Telework Policies

“In [our county] we just don’t have a lot of data around telework, so we formed a telework task force to identify how we could prove whether telework is working or not and achieving the

goals of productivity and ergonomic safety and good client service.” – Agency Leader

At the onset of the large-scale transition to remote work, some agencies were able to utilize existing teleworking policies, while other counties rapidly drafted new ones. Suggestions and strategies for successful telehealth policies include the following:

- Adaptable and responsive to changing county public health requirements and best practices
- Clear identification of work that is possible to conduct remotely and work that is essential to provide in-person
- Attention to equity concerns regarding the staff positions that are allowed to work remotely (e.g., managers versus frontline staff) and exploration of potential hybrid options for scheduled days or tasks that do not require employees to be in-person
- Flexibility for remote schedules depending on the needs and workflow of agency departments and employees (e.g., including policy options for predictable scheduled employee hours as well as flexible, project-based schedules)

Information Technology

“During the first week...everybody was pretty much working around the clock. We were at the office until 1 or 2 o’clock in the morning almost

every night...We tried to get the equipment out as quickly as possible for the 600 staff that didn't have laptops yet...it was a very concerted effort and everybody had the mentality of...for the greater good." – Agency Leader

"We also issued cell phones so that staff who didn't have internet access at home or who were in an area where internet was very slow, or in a community where they're sharing that Wi-Fi signal with others...are able to toggle and use the hotspot." – Agency Leader

As shelter-in-place directives went into effect, there was large variation in staff access to laptops and phones that supported remote work based on agency position. Many agencies also experienced software limitations that challenged remote access to agency technology systems. In response to these challenges, agencies worked quickly across departments to develop strategies to ensure employees were supported to work remotely where possible.

In addition to hardware challenges, many agency record-keeping systems were not designed to support remote client record keeping, information sharing, and digital signature. In response to these gaps, county agencies developed digital document strategies that were responsive to client privacy and security laws and guidelines. At the same time, many county agencies continued to conduct record keeping with employees on-site.

Responding to Client Privacy Concerns in a Remote Environment

Working from home presents unique challenges to maintaining client privacy. While most agencies were able to pivot to online documentation systems, many employees were tasked with providing confidential services in shared living spaces. Clients accessing services also often lack access to private spaces. In these cases, county agencies have developed



strategies such as avoiding public Wi-Fi networks, establishing secure wireless network connections, and using headphones to avoid confidential information being overheard by others.

Ergonomic Supports

"We started doing virtual ergo assessments because we don't want people to hurt their backs, we want them to stay healthy working at home, but we also feasibly can't buy desks for everybody." – Agency Leader

"The message in the agency was, 'if you need it, take it.'" – Agency Leader

"We had a "get it done" approach that worked really well in the first weeks and ensured that folks that had ergo equipment could take them...the question now is how do you sustain ergonomic work over a long period?" – Agency Leader

The wide-scale transition to remote work posed a new threat to employee safety, accompanied by worker's compensation concerns. Without proper ergonomic support, many employees struggled to complete work safely at home. Given financial limitations, most agencies are not able to provide ergonomic solutions for both work and home offices. Within this context, individual agencies developed policies and procedures for:

- Conducting ergonomics assessments, including virtual assessments
- Determining whether employees should take current office workstations home or purchase new equipment
- Developing procedures for ordering equipment (including external monitors, keyboards, headsets, and footrests) and replacing equipment as it wears
- Responding proactively to safety concerns
- Addressing worker's compensation and injury concerns



Many counties were able to provide some forms of ergonomic supports for employees, and counties varied in whether they decided to purchase new equipment or allow employees to take equipment home. Funding equipment purchases was also a challenge, and many counties were able to fund smaller purchases such as keyboards, external monitors, and footrests, but purchasing ergonomic desks was often cost-prohibitive. Some counties were able to shift traditional funding streams to purchase ergonomic equipment. For example, one county gained approval from the Board of Supervisors to shift resources from professional development funds into purchasing equipment for staff.

MANAGING PHYSICAL AND MENTAL HEALTH IMPACTS OF THE PANDEMIC ON EMPLOYEES

“Not only do we have the loneliness and disconnect, but we also have powerful social unrest. Organizations have created various ways to connect, that have worked well virtually because people have the option to log on and to connect if they want to, or just listen...people are coming together for a focused conversation around a topic – how are you feeling, what do you need from your leaders, what kind of reactions are happening.” – Agency Leader

As the pandemic stretches far beyond most initial predictions, leaders and employees are struggling with feelings of overwhelm and burnout. Many employees have experienced profound losses. For employees who are parents or caregivers, the additional challenges of managing changes to childcare, teaching children at home, or caring for sick loved ones have stretched their capacity to its limits. Many employees are also experiencing challenges in maintaining a work community and supporting connections in remote and hybrid environments.

Supporting Connection

“The power of connection is more important now.” – Agency Leader

“How do we make sure that we don’t just get so wrapped up in what we’re doing that we forget that we have staff out there who are doing work for us every day.” – Agency Leader

“I have changed the way I lead meetings, including adding a real check-in at the beginning.” – University Leader

BASSC partners shared many ideas for supporting connection for staff in both remote and hybrid environments, emphasizing the need for more frequent formal and informal check-ins. Some strategies included:

- Implementing “huddles” in the morning at shift changes to check in as a team about daily tasks and staff well-being
- Developing and supporting opportunities to attend Employee Resource Groups based on shared identities and experiences
- Increasing supervision frequency
- Identifying “buddies” or mentor systems for staff to check in with each other regularly
- Developing informal methods of communication through channels such as Zoom, Teams, or Slack
- Holding regular virtual social events, “Zoom Check-Ins,” or virtual “Happy Hours” to support relationship building

PERFORMANCE MANAGEMENT AND OVERSIGHT

“Performance Measurement is not just about data; it’s about people serving people and knowing if we’re doing well at that.”
– Agency Leader

“Some of the work just still needs to get done. Some of it is critically important, even to the level of people’s life and safety.” – Agency Leader

“Overall for the organization, this may not be the most productive year that we ever had. But how do we pick the key metrics most closely tied to our most important outcomes and really try to focus on meeting those?” – Agency Leader

In the midst of the social, emotional, and physical tolls of the pandemic, human services agencies and universities continue to provide essential services. Remote and hybrid work has presented new challenges to performance management and oversight. Effective performance management can strengthen the capacity of human service agencies to ensure that individual and community needs are being met while supporting staff professional development and growth. This can include:

- Measuring the quality, quantity, and efficiency of work and/or services
- Measuring impact on people’s lives
- Providing transparency
- Ensuring equitable evaluation
- Providing clear expectations
- Providing meaningful feedback to staff on outcomes and their impact



Common Challenges

“It didn’t feel very humane at this point in time to be hammering on individual performance.”

– Agency Leader

“If you don’t know what you’re trying to achieve, you can waste a lot of time measuring the wrong thing.” – Agency Leader

“It’s a whole other can of worms to try to look at how contracted service providers are being productive and the quality of their services.”

– Agency Leader

During the pandemic, all sectors have struggled with how to strike the right balance between monitoring the productivity of staff while understanding the persistent stress they face. Additional challenges to remote performance evaluation shared by county agencies include:



- Unclear outcome measures
- Technical issues with collecting necessary data
- Data quality issues
- Resource constraints (including time, staff, and technology)
- Discomfort related to giving and receiving feedback on an individual and programmatic level
- Lack of infrastructure and resources to reward positive performance (e.g., civil service systems often provide more pathways for documenting poor performance)
- Additional data gathering and evaluation constraints when working with contracted agencies

Equity Concerns

“We all want employees to be judged consistently and fairly.” – Agency Leader

“It’s just not a level playing field right now as some employees are home with kids and others are still commuting into the office and doing work there to support those who are on telecommute.” – Agency Leader

“You want people to feel that the opportunity to work from home is available to them, so we’re working harder to provide that opportunity to our front-facing staff. There is a feeling that they’re already the ones carrying on a bigger risk by being in the office and not having work from home opportunities.” – Agency Leader

“[We] had a conversation with senior managers about how impactful the pandemic is to women in particular because women are the caregivers for most people in our culture. So even within your organizations, how do you practice sensitivity to everybody, but certainly for the women that are caregivers in your departments.” – Agency Leader

Many county representatives voiced equity concerns related to remote work and performance evaluation. Unequal access to opportunities to work from home based on staff role or position were common. In addition, primary caregivers, especially women, reported significant challenges in meeting the competing demands of work and caregiving needs. Leaders expressed concerns about how to assess employees given inequitable employee experiences and responsibilities exacerbated by the pandemic. In addition, when speaking to performance measurement in general, counties noted that some positions and departments have more easily quantifiable metrics; where qualitative performance measures are employed, there may be increased potential for subjective bias in assessment.

Performance Management Strategies

“Keep it simple and close to the worker.”

– Agency Leader

“We think that employees need to own their data – they need to own their results.”

– Agency Leader

“We found that employees wanted clear criteria for how to know when they’re exceeding standards.” – Agency Leader

To begin to address performance management challenges and concerns, BASSC partners shared numerous performance management strategies. Some key themes include:

- **Connect individual performance measures to organizational and program goals.** By identifying how individual workers’ roles impact organizational and program goals, it can delineate the skills and expectations that are essential to each role.
 - **Set clear roles and responsibilities.** Most employees within the public sector want to do their jobs well. As many counties noted, it is essential to clearly articulate employee responsibilities and communicate how these will be measured to employees early and often.
 - **Identify accurate performance indicators.** Performance indicators can include quantitative data (such as call rates) as well as more qualitative employee self-evaluations of service quality and/or progress toward goals that correspond to identified responsibilities and expectations.
 - **Designate sufficient time and resources to holistically evaluate performance.** This includes developing methods to emphasize positive performance.
 - **Develop systems for collecting and keeping data.** This includes addressing technical and capacity constraints regarding data collection for performance and impact indicators.
 - **Have employees track and monitor their own data.** As one county noted, when employees track their own progress on goals, it can increase feelings of ownership and decrease experiences of defensiveness in the supervision process. Best practices include asking employees to track their progress on their performance indicators and professional development goals and present their progress to supervisors at regular intervals.
 - **Identify data stewards.** In addition to employees tracking their data, counties shared that it is helpful to identify individuals, teams, or departments who have the skills to collect programmatic data and share it back with
- **Set clear goals at an organizational and individual level.** As one county suggested, it is helpful to ask, “What do we really care about as an organization?” The answer to this question can help clearly define the outcomes an organization cares about and ensure that goals at all levels are connected to this same overarching aim.

individuals and programs in a way that is useful and digestible.

- **Assess forward.** While many organizations use annual assessments that look back at worker performance over the past year, best practice suggests that employees benefit from setting their own goals in tandem with their supervisors and monitoring their progress regularly with data they are tracking themselves. There should be no surprises or new information at an annual evaluation.
- **Build a culture that supports continuous improvement.** As one agency leader notes, *“The real key here is understanding that performance management is not a monthly report and it’s not an annual evaluation. It’s about building an organizational culture that has a performance focus baked into it and about developing holistic approaches to performance management.”*

TRANSITIONING BACK TO AND/OR MAINTAINING IN-PERSON WORK

Managing Public Safety

As more county agencies and universities continue to transition to in-person and hybrid work, they have developed policies and procedures in accordance with public health directives and best practices, including:

- Managing social distancing in shared spaces
- Developing vaccine policies in accordance with local mandates
- Determining masking guidelines in offices
- Developing sanitation and cleaning procedures

Given the shifting public health recommendations, these in-person guidelines are continuing to evolve.

Adapting Policies and Practices to a Changing Environment

“Organizations need to clarify if there will be a continuation of the recent

collaboration conversation or is it going to be the re-institutionalization of a compliance environment...It’s important to begin these conversations now and make it collaborative.”
– University Leader

As the ongoing effects of the pandemic continue to unfold, the public sector is grappling with significant staffing vacancies. Even so, agencies are aspiring to support employee well-being and manage burnout while continuing to provide timely and essential services. Over the last three years, agencies and universities have demonstrated an ability to rapidly pivot to meet the needs of their staff, students, and communities in extraordinary circumstances. Going forward, there are many opportunities to partner with staff, clients, and the wider community to co-develop policies that support work and instruction in a changing landscape. As the research has found, the effects of remote work are influenced by multiple interacting factors such as frequency of remote work and supervisor and colleague relationships. Additional exploration of these complex and evolving impacts is needed.



CONCLUSION

The CalSWEC COVID 2.0 Ad Hoc Committee and the BASSC CIE Sessions captured essential lessons from university and agency partners in real-time as they adapted to meet the needs of students, staff, faculty, clients, and communities. At the onset of shelter-in-place directives, many agency and university staff and faculty worked around the clock to continue providing essential services to students, clients, and communities. These efforts resulted in marked departmental, inter-university, and inter-agency collaboration and innovation. Increased remote communication has engendered more opportunities for counties to engage in statewide discussions and began to address a longstanding collaboration challenge for universities and agencies in smaller and rural counties. University and agency leaders also highlighted persisting inequities and areas for needed growth.

The effects of the COVID-19 pandemic combined with the impacts of concurrent climate disasters and heightened economic insecurity have had devastating impacts on individuals and the effects continue to ripple into the present. At the same time, widespread racial justice reckonings in the face of police violence and systemic racism against BIPOC communities in addition to shifting cultural conversations around the role of work, caregiving, and compensation have catalyzed essential conversations regarding DEIB in the workplace. These changes have required a shift in the ways that universities and counties operate and continue to provide opportunities for responsive innovation. As the public sector approaches these complex challenges, key takeaways from the CalSWEC COVID 2.0 Ad Hoc Committee and the BASSC CIE conversations include:

- Clear and consistent communication across all levels has been essential in the face of persistent unknowns and evolving information.

Example Practice Strategy: Create a method for agency-wide or university-wide information sharing, such as regularly scheduled email updates, broadcasts, meetings, or community forums.

- To begin to address inequities, it is necessary to center the perspectives and experiences of individuals and communities most impacted.

Example Practice Strategy: Collect consistent community, client, student, and/or staff feedback on agency and university operations through advisory councils, community forums, and/or anonymous surveys.

- Increased flexibility around working locations, schedules, and timelines has allowed students, staff, and faculty to juggle conflicting demands while continuing to provide essential services.

Example Practice Strategy: Identify essential job duties and corresponding timelines that must be met to continue service provision and/or agency and university operations. This allows staff members to prioritize crucial duties during times of crisis while creating necessary flexibility around tasks that can be postponed in the short term.

- Equitable access to technology is critical to the continuity of learning, work, and service provision in remote and hybrid environments.

Example Practice Strategy: Prioritize funding to bridge technology gaps for students, workers, and clients who lack adequate tools to access work, education, or services. When

internal funding is limited, explore external public and foundation funding opportunities targeted at alleviating technology equity gaps.

- Additional strategies are needed to help students, employees, and clients weather the longstanding impacts of the pandemic on physical and mental well-being.

Example Practice Strategy: Use supervision and check-ins to brainstorm tangible ways that employees can delineate their work and personal responsibilities when in remote and hybrid environments. Supportive practices such as developing a practice ritual to “clock out” at the end of the work day can help prevent employee burnout.

In addition to these key takeaways, the CalSWEC COVID 2.0 Ad Hoc Committee and the BASSC CIE conversations highlighted remaining questions regarding the impacts of the COVID-19 pandemic on education, well-being, and retention such as:

- How has remote work and instruction impacted graduating students’ preparedness for the workforce?
- What university and field placement key competencies will best prepare students for the wide scale shift to telehealth services?
- What supports will help students and employees navigate the ongoing impacts of the pandemic on burnout, mental health, and well-being?
- How can agencies and universities support employee retention within the midst of a changing social and economic landscape?
- How can agencies and universities better assess the equity impacts of proposed policies, procedures, and solutions?








As the effects of the pandemic continue to unfold, these questions would benefit from additional exploration and collaborative conversations among state and regional partners. CalSWEC and BASSC look forward to the opportunity to support continued shared learning across the public sector.



APPENDIX A. RESEARCH RESULTS TABLES

The research summarized in Figures 1-3 reflects studies published before July 2020. A complete list of the studies reviewed can be accessed [here](#).








FIGURE 1: EMPLOYER BENEFITS AND COSTS

Issue		Effects	Related Factors
Turnover		<ul style="list-style-type: none"> • May reduce turnover • Decreases employee intent to leave 	<ul style="list-style-type: none"> • Choice and flexibility • Where/when to work
Absenteeism		<ul style="list-style-type: none"> • Fewer absentee days 	<ul style="list-style-type: none"> • Reduced work-life conflict
Organizational Commitment		<ul style="list-style-type: none"> • Increases organizational commitment and identification 	<ul style="list-style-type: none"> • Communication satisfaction • Quality of work relationships
Performance (Individual)		<ul style="list-style-type: none"> • Positive effects on individual performance, productivity 	<ul style="list-style-type: none"> • True for objective/supervisor rated performance • Increased hours, more control and flexibility
Performance (Organizational)		<ul style="list-style-type: none"> • Innovation • Customer/vendor relations 	<ul style="list-style-type: none"> • Innovative organizations may opt for RW
Performance Monitoring Challenges		<ul style="list-style-type: none"> • Perceived challenges to monitoring 	<ul style="list-style-type: none"> • Trust minimizes lower visibility concerns • Assess output not actions
Knowledge Sharing (KS)		<ul style="list-style-type: none"> • Reduces opportunities for communicating ideas and information 	<ul style="list-style-type: none"> • Trust, relationships, org commitment strengthen KS • Tech support, relationships increase trust and strengthen KS

Arrows:

- If it's green, it's a benefit
- If it's red, it's a concern
- If it points up, it represents an increase
- If it points down, it represents a decrease
- If it's smaller, the evidence is weaker
- If it's bigger, the evidence is stronger









FIGURE 2: EMPLOYEE BENEFITS AND COSTS

Issue		Effects	Related Factors
Well-being		<ul style="list-style-type: none"> Increases work-life balance, by reducing stress and work exhaustion 	<ul style="list-style-type: none"> Autonomy Time pressure
Job Satisfaction		<ul style="list-style-type: none"> Positively effects job satisfaction Increase levels off at higher frequency of RW 	<ul style="list-style-type: none"> Increased sense of control and autonomy Supervisor/coworker relationship quality
ADA Accommodation		<ul style="list-style-type: none"> Can be a reasonable accommodation Can expand hiring pool 	
Work-family Conflict		<ul style="list-style-type: none"> Mixed evidence on the effects Stronger effects for higher frequency RW <ul style="list-style-type: none"> Work interferes less with family Family interferes more with work 	<ul style="list-style-type: none"> Schedule flexibility Options to create boundaries Increased experience with RW over time reduces work-family conflict
Advancement		<ul style="list-style-type: none"> Early research reports mixed effects Recent study found no effect on promotions, but lower salary growth 	<ul style="list-style-type: none"> Organizational endorsement of RW limits negative effects
Work Relationships		<ul style="list-style-type: none"> Supervisor relationships are affected positively High frequency RW affects coworker relationships negatively Remote managers: <ul style="list-style-type: none"> Positive effects for RWs Negative effects for office-based workers 	<ul style="list-style-type: none"> Fewer face-to-face interactions Less informal communication Contributions less visible Similar manager/worker arrangements appear beneficial
Social/Professional Isolation		<ul style="list-style-type: none"> Advancement concerns Increases performance challenges Increases intent to leave 	<ul style="list-style-type: none"> Social isolation not unique to RW “Belonging” strengthened by choice and org knowledge Concerns may be greater than actual effects

Arrows:

- If it’s green, it’s a benefit
- If it’s red, it’s a concern
- If it points up, it represents an increase
- If it points down, it represents a decrease
- If it’s smaller, the evidence is weaker
- If it’s bigger, the evidence is stronger

FIGURE 3: FACTORS INFLUENCING EFFECTIVENESS OF REMOTE WORK

Issue	Effects	Related Factors
Job Characteristics		
Autonomy		<ul style="list-style-type: none"> Increases satisfaction, productivity and performance Decreases absenteeism, work interference with family
Complexity/Creativity		<ul style="list-style-type: none"> Higher complexity work positively affects performance for higher frequency RW Creative work has positive implications for productivity
Interdependence		<ul style="list-style-type: none"> Decreases productivity Lower job satisfaction than for non-interdependent RW
Employee Characteristics		
Self-Management/Planning		<ul style="list-style-type: none"> Increases performance/productivity
Communication Skills		<ul style="list-style-type: none"> Formal and informal communications have positive effects on knowledge sharing, team performance
Organizational Supports		
Supervision		<ul style="list-style-type: none"> Trust Monitor outcomes/outputs not activities Training: technology, time-management, boundaries
Communications		<ul style="list-style-type: none"> Co-worker communications support team performance Leader communications promote adoption, implementation
Technology		<ul style="list-style-type: none"> Mitigates impacts of virtual/remote communication

Arrows:

- If it's green, it's a benefit
- If it's red, it's a concern
- If it points up, it represents an increase
- If it points down, it represents a decrease
- If it's smaller, the evidence is weaker
- If it's bigger, the evidence is stronger

APPENDIX B. CALSWEC ADVISORY BOARD AND BASSC MEMBERS

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** BASSC Co-Chair

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