

THE NEW “NORMAL” – HOW TO ENSURE OUR CREDIT UNIONS’ REMOTE WORKING POLICIES ARE BUILT FROM A DEI PERSPECTIVE

WITH SELF-ASSESSMENT,
RECOMMENDATIONS, AND ACCOMPANYING
RESOURCES

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Introduction

As organizations recover from a forced and literal “overnight” transition to a virtual workforce, many are beginning to look to the future and the potential long-term benefits for both employees and organizations. Companies that wondered if this type of arrangement would work for them were given an enforced experiment through the COVID response and many have realized they can make it work.

Employees have adapted well: 72% of employees in one survey¹ said they wished to work from home at least one day per week. As we turn the page on a vaccine-ready world, it is important to consider structures of a remote workforce. Do the policies that are being drafted consider the full implications of their creation? Namely, will they offer an equitable opportunity to all employees and enable a fully inclusive remote working environment? To answer these questions, [i3's](#) Team Inclusion created a Remote Ready Self-Assessment for credit union leaders. Our goal is to help executives consider how to support a remote workforce through a DEI lens, and to help them take the first step by providing recommended actions.

As the concept of the office and work hours continue to evolve, our policies can and should reflect the changing nature of work in a way that makes it more inclusive. Now that more of the workforce is remote, there is an opportunity to focus on what gets done versus when the work is completed. For example, for working parents this shift may allow flexibility to create a work schedule that begins with childcare commitments and works backwards, rather than the other way around. For the organization, benefits go beyond providing options to serve a greater range of employee needs and *can* include increased productivity and cost savings, but they must ask will these opportunities be available to all employees equally? The racial disparities related to work from home capability are pointed. As an example, 82% of White adults in the U.S. report owning a desktop or laptop computer compared to 58% of Blacks and 57% of Hispanics². There are many reasons for this preparedness of workers from minority households from the lack of a suitable space to the technical infrastructure required. On the other side of the spectrum, there have been social stigmas, and career impacts, for working parents or people with disabilities who had worked from home before. There is an opportunity now to level the playing field. But knowing inequalities exist, what is the responsibility for an employer offering remote work opportunities to *ensure* the opportunities are equally available for both their current and prospective employees?

Whether remote work is a stipulation for a particular role, or a necessity because of situations such as the current global pandemic, it is imperative to consider how working from home carries additional burdens for some members of a diverse workforce. Today's workers see regular examples of visible home-based work distractions. In addition, there are less visible stresses at play that organizations can seek to address with remote working policies that include a focused DEI lens. For example, Black workers may strategically engage in code-switching³ — adjusting their speech, appearance, and behaviors to optimize the comfort of others with the hopes of receiving fair treatment, quality service, and opportunities. “Work from home arrangements often require people to (virtually) invite coworkers, clients, physicians, students and professors into their homes, which undermines their ability to exercise agency and control over how they present their identities” (Roberts and McCluney). When we create new policies that fundamentally shift the work environments of our employees, it is an appropriate juncture to consider the less apparent impacts to our workers emotional security.

¹ [PWC Covid-19 Remote Work Survey](#)

² [CNBC Remote work risks creating a new digital jobs divide for minorities](#)

³ [HBR Working from home while Black](#)

How we manage employees in new structures also needs to change, whether they are fully remote or hybrid. The cultural maturity of an organization depends upon management maturity and may need to adjust to meet the new normal that remote working presents. Organizations need to consider how different behavioral styles will respond to a change in working structure. For example, analytical behavioral styles have a harder time interacting in real time virtual conversations whereas there is a tendency for "controllers" to dominate virtual meetings - white males are most commonly controllers. Deloitte tells us to "Assume positive intent with all team members and have a conversation before making a conclusion about how work is getting done – ambiguity is inherent in having team members working virtually and can lead to assumptions about focus and commitment to work. A relationship of trust, respect, open communication, and clearly defined expectations are essential for success."⁴

This is a new muscle for many organizations and assuming remote work will mirror the in-office experience without proper intention is going to prevent some from being successful.

Whether your organization is beginning the journey to establish a **Remote Work** policy that is inclusive of the diverse needs of your employees, or committed to evolving your work style designs so that they continue to be equitable in their application, our hope is that the following Self-Assessment will allow you to think about the broad challenges and opportunities, help you to monitor progress, and provide some useful tools for your specific stage in your remote working evolution.

⁴ [Deloitte Working remotely success](#)

‘Remote Ready’

A Self-Assessment
for **Credit Union
leaders** who
want to build
fair and
inclusive
working from
home
practices



Scoring Rubric

Score 3	Our credit union has fully met this/these considerations
Score 2	Our credit union is well on its way to meeting this/these considerations.
Score 1	Our credit union has begun to meet this/these considerations
Score 0	Our credit union has not yet begun to embark on this work.

USE THE SELF-ASSESSMENT RUBRIC ABOVE TO EXPRESS YOUR VIEW OF YOUR CREDIT UNIONS’ CURRENT STATE OF PREPAREDNESS IN HAVING ACCOMMODATED EACH OF THE CONSIDERATIONS.

AS YOU GO THROUGH THE QUESTIONS, APPLY A SCORE OF 0 TO 3.

WE RECOMMEND YOU TAKE THIS ASSESSMENT A SECOND TIME AFTER YOU HAVE TAKEN ACTION ON THESE CONSIDERATIONS WITHIN YOUR REMOTE WORK POLICIES.

SELF - ASSESSMENT

	Section 1 - Culture	Score #
1.1	Have you identified your organizations' key driver for enabling a remote working policy?	
1.2	How would you rate employees' feeling of transparency in decision making by management?	
1.3	Are managers naturally willing to adopt a mindset of trust and empowerment as opposed to command and control?	
1.4	Is management committed to open communication and documentation practices, or do they prefer closed doors and limiting access?	
1.5	Does management seek to listen to remote team members to understand what voids exist and need to be addressed?	
1.6	Does your credit union have a 'welcome' process for new staff members who are onboarding remotely?	
1.7	Does your credit union set clear expectations of performance for each role?	
	Section 2 - Technology & Processes	Score #
2.1	Do team members have a strong understanding of digital communication tools?	
2.2	Do team members have secure methods of accessing sensitive information (e.g. established VPN protocols)?	
2.3	Does your credit unions' business operations or IT department have strong protocols for enabling remote team members?	
2.4	Does your organization supply specialized equipment to accommodate staff members with disabilities?	
2.5	Does your credit union have strong documentation for core company processes?	
2.6	What level of awareness do your employees have of the channels they can use to report technical problems?	
	Section 3 - Inclusion	Score #
3.1	Does your credit union measure the diversity of your workforce?	
3.2	Does your organization have training that addresses remote coaching, careers progression, and the potential challenges for diverse employees working remotely?	
3.3	Does your credit union have any way of measuring employees' sense of belonging or satisfaction across diversity groups?	
3.4	Does your credit union have processes or methods of accommodating employees' diverse needs in order to allow them to effectively work from home?	
3.5	Does your organization have a plan to foster an inclusive workplace when working remotely?	
3.6	Have you initiated activities to review your credit union cultural norms, such as holding town halls, gathering employee feedback, drafting organizational policies?	

DEFINITIONS

Emerging: Your credit union is embarking on the journey of applying inclusive practices to remote working policies. You recognize that there is an opportunity to do this differently in your organization and growing and developing these policies will benefit your organization beyond your remote working approach.

Evolving: Your organization has created the foundations of inclusive work practices. Now you want to take the next step to address challenges that solidify your intentions into meaningful impacts on the day-to-day well-being of your diverse employee group.

Embedding: As an organization that has laid the groundwork for diversity, equity, and inclusion in your work practices, both on-site and in remote locations, you can now examine your opportunities to excel and advance the well-being of your employees. This is an ongoing journey, and you continue to search for new ways to ensure your employees have a sense of belonging. You continue to seek opportunities to be a leader in this space.

RECOMMENDATIONS

Upon completion of the assessment, tally your scores and review the recommendations below.

Section 1 - Culture

Score 0-7 Emerging	<ul style="list-style-type: none">• Understanding your strategic purpose for initiating a remote working policy is essential to clarify for your leadership. If it is for cost savings, to address the need for diverse talent, or to address business continuity, is key to how you address the policies you create.• Establish training for managers that specifically deals with managing remote teams including coaching remotely and career progression.• Set standards or expectations for 1:1's for all staff. This is an important habit to have built in your organization regardless of location but when remote working, this needs to be intentional and standardized across the organization.• Provide training that focuses on providing and receiving feedback can also be delivered as part of employee development programs.
Score 8-14 Evolving	<ul style="list-style-type: none">• Document and publish your communication plan so that employees can rely upon it and you have committed to following it.• Consider how to leave space for comment and questions.• Publish community guidelines for feedback (speaking only for yourself and not others, not naming others, using respectful language) can be a positive approach to garnering healthy dialogue.• Ensure you have ways to capture and measure employee feedback and sentiment. Survey employees to understand and measure how empowered they feel. Leadership should establish desired expectations; survey findings should be communicated to management and action plans should be completed as necessary.
Score 15-21 Embedding	<ul style="list-style-type: none">• Consider the communication channels you are using to promote asynchronous communication.• Highlight decisions based on feedback. Engagement is increased greatly when employees see that their feedback is turned into action.• Work with your managers to build the habit of assuming positive intent with all team members - have a conversation before making a conclusion about how work is getting done• Provide ongoing reinforcement of the importance of trust and empowerment as part of the company's culture. New leaders to the organization should complete training that specifically deals with managing remote teams.

Section 2 - Technology & Processes

Score 0-6 Emerging	<ul style="list-style-type: none">• Establish a standard set of hardware and software that employees will need with role-based definitions so that what is standard issue can be well understood.• Review the capabilities of your current technology – are there untapped features that would be helpful in remote working situations.• Be sure to assess and close the security and control gaps in your remote work set-up.• Assess whether traditional communication methods used to conduct meetings – including email and phone calls –are conducive to supporting the needs of individual teams. Also, identify best practices that may exist and if appropriate, share across the organization.
Score 7-12 Evolving	<ul style="list-style-type: none">• You are making the shift from in person to collaboration to dispersed contribution possible, through collaboration tools and virtual whiteboards, testing, chat and video providers.• Assess the data that will be held by third parties and consider what information they hold (e.g. member personal information) and how it is stored/encrypted.• Ensure that your staff is trained in privacy and data practices to understand what information can and cannot be stored by third party vendors. Consider an enterprise license where you have agreements in place and the potential for Single Sign On.• Make available advanced communication and collaboration tools including instant message, video calls and an intranet. Identify and work with employees to resolve any barriers that may exist that prevent them from fully leveraging these tools. Make training available as needed.
Score 13-18 Embedding	<ul style="list-style-type: none">• Think about reinvesting realized savings from your remote workforce into equipment and tools that can make your remote workers thrive.• Consider how the organization can leverage funds for equipment and access for team members who are unable to take advantage of remote working due to lack of Wi-Fi, workspace access, or due to disabilities.• Create a group that shares top tips on how to use and key features that you highlight using training tools that you already have in place. Consider making 1-minute video tutorials that show how to use different features.• Take a closer look at how many (and which) cloud apps and services you are investing in. Prioritize those that support remote styles of work in the long run.• Leverage advanced communication and collaboration tools and technologies already in place at the credit union to keep employees informed and engaged. Monitor them for unintended overuse and fatigue and set expectations appropriately.

Section 3 - Inclusion

Score 0-6 Emerging	<ul style="list-style-type: none">• Talk to your staff - Survey/Town Hall establish a cadence of communication that your employees can rely on.• Establish Employee Resource Groups for the diverse makeup of your organization. Ensure you have leadership at the table so that the group has power and authority. Ensure that the ERGs are representative of the entire organization and your community so that it is not the diverse members of your organization shouldering the burden of the work.• Conduct a process review to ensure that procedures are reflective of your employees' diverse needs. Validate that you are not simply transferring onsite policies to remote workers if they are unnecessary or irrelevant in the new environment.• Target tangible actions and share them with your credit union employees so that they see your explicit commitments.
Score 7-12 Evolving	<ul style="list-style-type: none">• Create a Remote Leadership Team Playbook - design a consistent approach throughout the workplace by developing a playbook that addresses the distinct leadership skills that are necessary when managing teams remotely. Consider training programs and tools that work effectively in a virtual setting that include considerations of a diverse workforce.• Think about how your hiring practices are inclusive and how there may be greater opportunities to hire people with disabilities.• Review your communication plan. Does it meet the diverse needs and challenges of your employees? Does it have input from employees on how they best receive information.• Look at the flexibility of your working hours and team meetings. Establish team norms that produce organizational priorities. These may have changed from on-site norms so be open to re-setting.
Score 13-18 Embedding	<ul style="list-style-type: none">• Develop a sense of belonging amongst workers – get diverse feedback to understand what this means to different groups of employees. Encourage employees to value different perspectives and the different things that their peers bring to their work.• Promote Employee Assistance Programs that counsel and advance the needs of a diverse workforce.• Publish communications that amplify the benefits of a diverse employee group and the ways that your organization is committed to the equitable advancement of each of them.• Review all Policies and Procedure for pronouns / language that include historical context or roots.• Make (bold) commitments to hold your organization accountable, not just now but into the future.

Remote Ready Resources

Culture

[HBR Does your Company Have a Long-Term Plan for Remote Work?](#)

[How to Create Perfect Work from Home Policy with Template](#)

[Most of your employees are not ok](#)

[2020 Global Employee Experience Trends](#)

Technology & Processes

[How remote work risks a new digital jobs divide for minorities](#)

[The Cloud is the Backbone of Remote Work](#)

[Six remote technologies that are changing the way we work](#)

[Racial and ethnic differences in how people use mobile technology](#)

Inclusion

[Can remote Workforces Improve Diversity and Inclusion?](#)

[Diversity, Inclusion and Belonging Resources](#)

[Can Remote Workforces Improve Diversity and Inclusion?](#)

[Working from home reveals another fault line in America's racial and education divide](#)

General (covers all 3 topics)

[2020 Remote Playbook from largest all-remote company - GitLab](#)

[Why remote working will be the new normal, even after COVID-19](#)

[CUNA Managing a Remote Workforce webinar](#)

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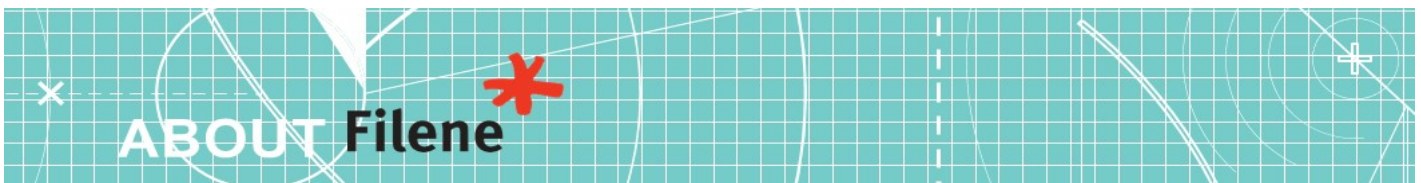
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