

# REOPENING OUR WORKSPACES: A Playbook



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## INTRODUCTION

Returning to the workplace sounds like something simple. We were away—and now we're coming back! In truth, the questions of whether, when, and how to reopen an organization's workspace are difficult and complicated. As Catherine Bell and Amy Born [have written](#), most of the public discourse about returning to the workplace has focused on "the technical mechanics of returning to the office—how to bring people back in a way that safeguards their physical health.... Somewhat absent from this coverage are considerations about the whole person and the whole organization as employees return to the office. What about

the social and emotional needs that individuals will be facing as they return to the workplace, and the ways this transition will impact organizational culture?"

**A workplace is more than a place.** Where we work profoundly affects how we work, with whom we work, and when we work. Decisions about the workplace have a direct impact on team culture, how people work together, and how the work actually happens.

Reopening a workspace doesn't happen all at once. Employees, leaders, work processes, team culture, and programming will all need significant time to

adjust to this complex and interlocking set of changes. Instead of thinking only about “Reopening Day,” leaders need to think about the longer process, and returning and adjusting to the workplace after time away.

Psychologists and management specialists have long known about the [“fresh start effect.”](#) Major milestones and changes—geographical moves, the New Year on January 1, the beginning or completion of a major project, significant anniversaries, and more—can help people put past habits behind them and achieve new growth and change in ways they find more difficult in the absence of these milestone moments.

While some organizations may rightly decide that their past ways of operating are exactly what this moment needs, and return to an unchanged set of strategies and tactics, this playbook encourages every organization to ask the question: **Should we go back and resume what we were doing, or should we view this as an opportunity to re-dream what we could be doing?**

Whether you and your leadership team are just beginning the reopening conversation, are in the middle of planning a reopening, or have reopened and begun your readjustment, this guide can help you along your journey to a stronger organization.

## Should we go back and resume what we were doing, or should we view this as an opportunity to re-dream what we could be doing?

# HOW TO USE THIS PLAYBOOK

**T**his playbook is meant to help you make important decisions around re-opening your organization’s workspaces. It provides questions and frameworks to help you consider decisions from various angles so that your organization can preserve and enhance your team’s ability to serve its mission.

**This playbook has been created with a focus on reopening in the context of COVID-19. We want to acknowledge that many other issues and dynamics are shaping the challenges each organization faces.** In particular, recent incidents of police brutality have triggered mass protests against racism in America, and organizations planning to reopen their workplaces will need to reckon with the ways these developments will—and should—affect their work. Thinking about diversity has always been necessary to ensure organizations achieve cultures where all talent is included and all employees can thrive, but these recent events make it even more imperative for

leaders to consider not only how each individual on their team will be affected by new policies and choices, but also how various racial and identity groups may be affected differently. Throughout the playbook, we call attention to issues of diversity, equity, inclusion, and justice (DEIJ) as they intersect with the process of planning a return to physical workspaces after the COVID-19 pandemic in particular, but it’s also worth emphasizing at the outset that leaders should also consider the broader social context.

Different sections of the playbook will be more or less relevant to you, depending on the type of organization you lead and other unique circumstances. These frameworks cannot be comprehensive; this crisis is unprecedented and, as the Jewish nonprofit field navigates the coming years, all of us will learn new things we couldn’t have foreseen. As time goes by, we hope you’ll share with us what you learn.

## HOW TO DECIDE: Frameworks and Conversation

This section outlines some frameworks that may help to structure your discussions. You may want to refer to them to ensure that you're covering as many important angles as possible.

### VALUES

Think about the values of your organization in figuring out whether, when, and how to reopen. What values are core to the mission, the employee experience, and the organizational culture you want to create? The answer will be different for each organization, but leaders should rely on those values in making decisions, planning to take action, and communicating with employees. In planning each stage of reopening,

decision-makers should take the plan they have created and inspect it through the lens of each organizational value.

Let's say, for example, that trust is a core value of your organization. If your leadership team is having trouble deciding just how much information to share with the full staff about an upcoming policy change—or how much emphasis to put on the change when communicating it—looking at the question through

the lens of trust might lead the team to break the impasse by choosing a more transparent option because openness and honesty can build trust.

Or perhaps *elu ve'elu*—pluralism—is one of your organizational values. Dedicating a few minutes to look at the reopening plan purely through the lens of *elu ve'elu* might lead you to create more options for employees to create their own paths forward than you might have done otherwise.

### TEAM CULTURE

Management guru Peter Drucker said, “Culture eats strategy for breakfast.” A leading workplace culture attracts brilliant and diverse talent, develops their technical and leadership skills, enables them to do their best work, and ensures that they understand the impact of that work on the world. But leading workplace cultures don’t just happen; leaders’ personal behavior and policy decisions—as well as the choices and behaviors of employees at all levels—can either nurture or stifle them.

Leaders should keep culture in mind whenever they’re considering significant changes to how the organization operates, and the reopening decision is no exception.

Since every organization’s values and priorities are different, we can’t spell out what decisions you’ll make based on the particular principles that give your organization its integrity. The important point is that our values should be more than slogans; they should be put into practical operation, and that means making them an explicit part of the process of planning.

#### Core factors of a leading workplace culture include:

- Trusted leaders
- Common purpose
- Respected employees
- Diversity, equity, inclusion, and justice (DEIJ)
- Talent development
- Clear salary and benefits

When deliberating about whether, when, and how to reopen a space, consider how each choice you make will impact these six core factors, as well as any other components of the culture you seek to foster in the organization.



**Culture eats strategy for breakfast.”**

**Peter Drucker**  
Management guru

# What Makes a Leading Place to Work?

What Makes a Leading Place to Work (cont'd)

## TRUSTED LEADERS

Becoming a leading place to work requires buy-in, commitment, and focus from top leaders to model behaviors and to create policies, practices, and procedures that empower all employees to thrive.

*Are leaders balancing vulnerability, transparency, and confidence in a way that is authentic to them?*

*How are leaders modeling the behaviors they hope and expect to see in their employees?*

*Are leaders prioritizing mental and physical health for themselves and their employees?*

## COMMON PURPOSE

Leading places to work have clear missions, visions, and core values that are regularly communicated, both internally to staff and externally to the communities they serve. Leaders inspire their employees by finding ways to reconnect them to the greater purpose of their work and helping them understand how their work is pivotal to the organization's overall mission.

*How have you shifted your focus?*

*How can you talk about your purpose in this moment? Are the decisions you are making in alignment with your organization's mission, vision, and core values?*

*Can you articulate how your work aligns with your organization's mission, vision, and values?*

*Does your decision and process around returning to the workplace meet the needs of your organization's mission and vision, and align with its values?*

## RESPECTED EMPLOYEES

Leading places to work ensure that all employees feel valued and valuable, and empowered to fully participate. Employees trust that they won't be punished or criticized for making a mistake or speaking their minds. This dynamic begins during the hiring process, continues through onboarding and training, and is woven throughout daily interactions between management and staff.

*How will your decisions around returning to the workplace affect your employees?*

*Are you doing what you can to ensure your employees feel respected and valued?*

*Are you meeting the human needs of your employees and treating them with respect and trust?*

## DIVERSITY, EQUITY, INCLUSION, AND JUSTICE (DEIJ)

Leading places to work fully integrate the principles of diversity, equity, inclusion, and justice into day-to-day operations and develop solutions to address systemic barriers within the organization. They are focused on developing teams that reflect the communities they serve. They fully understand the potential for organizations to perpetuate systems and behaviors that reinforce injustice. They ensure staff members are on the same page and speaking the same language when it comes to issues of inclusion. And they work to be culturally responsive and more deeply understanding of constituencies they serve.

*Are you looking at all of your decisions, communications, and actions through a DEIJ lens to ensure equity (not necessarily equality) for all of your people?*

*Are you intentionally reexamining decisions to ensure that your systems and behaviors reinforce diversity, equity, inclusion, and justice?*

## TALENT DEVELOPMENT

Leading places to work recognize that employees crave opportunities to advance their knowledge, skill sets, and abilities. Employees want to feel that their employer invests in them and cares about their future; that there is a plan for their growth and development; and that their advancement is truly important to the organization.

*Are you leveraging the changes—in the world or in the work—to further develop your people to meet the current challenges?*

*Are you finding ways for people to stretch and learn during a time when your organization requires new types of thinking and working?*

*How can you frame shifting portfolios in a way that highlights opportunities for growth?*

## CLEAR SALARY AND BENEFITS

Leading places to work understand that salary and benefits are foundational elements of an employee's experience at work. They have and communicate clear compensation philosophies and strategies that are applied fairly throughout the organization.

Nonprofit organizations often feel constrained in this area due to tight budgets. Though salary is not one of the top factors that influence whether an employee stays or leaves their organization, leading places to work find ways to equitably, flexibly, and creatively compensate their employees.

*How can you clearly communicate any changes you may have to make to salary and benefits?*

*Are there ways to create value and nonmonetary rewards during a time when budgets are tight?*

*Do you have a clear compensation philosophy that you can rely on and refer to when making compensation decisions?*

## THE PERSPECTIVES MATRIX

In approaching a reopening conversation, it may help to consider explicitly the different perspectives and experiences involved. How will any given reopening plan affect leaders? How will it affect line staff of various role types? How will it affect working parents or those with other caregiving responsibilities? Filling out a matrix like the one below may help you structure these considerations.

We recommend considering whether there are any potential conflicts between perspectives. What can help or guide you in resolving these conflicts? Recognizing that the organization's mission comes first, are all other perspectives weighed equally? What are the potential challenges if you prioritize some people's perspectives over others?

 [DOWNLOAD THE PERSPECTIVES MATRIX](#)

QUESTIONS	EMPLOYEE PROFILE A	EMPLOYEE PROFILE B	EMPLOYEE PROFILE C
Role, priorities, personal obligation such as dependent care, reliance on client contact, survivor guilt, changed responsibilities, etc.			
<b>Desire to reopen - Why/Why not?</b>			
<b>Ability to work remotely?</b>			
<b>What is necessary for productivity?</b>			
<b>What barriers might prevent a return to space(s)?</b>			
<b>What might be hardest for this person about the transition?</b>			

QUESTIONS	YOU (leader)	QUESTIONS	MISSION / CONSTITUENTS
Role, priorities, personal obligation such as dependent care, reliance on client contact, survivor guilt, changed responsibilities, etc.		Strategic priorities, values, etc.	
<b>Desire to reopen - Why/Why not?</b>		<b>Desire to reopen - Why/Why not?</b>	
<b>Ability to work remotely?</b>		<b>Ability to be fulfilled / served through remote work?</b>	
<b>What is necessary for productivity?</b>		<b>What is necessary for productivity?</b>	
<b>What barriers might prevent a return to space(s)?</b>		<b>What barriers might prevent a return to space(s)?</b>	
<b>What might be hardest for you about the transition?</b>		<b>What might be hardest about the transition?</b>	

QUESTIONS	BOARD MEMBERS	QUESTIONS	FUNDERS
Role, priorities, perspectives, etc.		Role, priorities, perspectives, etc.	
<b>Desire to reopen - Why/Why not</b>		<b>Desire to reopen - Why/Why not?</b>	
<b>Ability to convene/work remotely?</b>		<b>Ability to oversee funded work remotely?</b>	
<b>What is necessary for productivity?</b>		<b>What is necessary for productivity?</b>	
<b>What barriers might prevent a return to space(s)?</b>		<b>What barriers might prevent a return to space(s)?</b>	
<b>What might be hardest about the transition?</b>		<b>What might be hardest about the transition?</b>	

## DIVERSITY, EQUITY, INCLUSION, AND JUSTICE (DEIJ)

Diversity, equity, inclusion, and justice (DEIJ) are especially relevant to the current crisis. The COVID-19 pandemic has disproportionately harmed people who belong to marginalized minority groups. [According to the CDC](#), there is “a disproportionate burden of illness and death among racial and ethnic minority groups.” Additionally, research has found that [Black and Hispanic workers are less likely than those in other groups to have the option of working remotely](#). Furthermore, recent incidents of police brutality and mass protests against racism are raising

the extreme salience of DEIJ issues in the lives and experiences of many employees.

Leaders should therefore ensure that DEIJ issues are explicit and important parts of their decision-making processes at all stages of reopening. **Foregrounding DEIJ can ensure that organizations not only embody ethical organizational citizenship for the greater good, but also serve their own immediate needs by building and maintaining cultures that will attract the best talent and achieve the best results.**

## RESOURCES

- [HHS.gov, Cultural Competence](#)
- [SAMHSA, CCBHCs and Cultural Competence](#)

# WHETHER TO REOPEN

## KEY QUESTIONS

The following questions can help guide leaders and leadership teams in discussing whether to reopen their workplace(s) or resume face-to-face services. **The questions are meant to challenge some preconceived notions, help identify blind spots, and allow you to consider all aspects of your work.**

### Are employees logically able to return?

- Have state and local officials deemed it safe to return to non essential indoor workplaces?
- Are transportation systems that employees rely on functioning well enough?
- Are employees with children able to send them to school or child care?
- Are employees with dependent adults able to arrange the caregivers they need?

### Why reopen the space?

- What is the purpose or motivation behind considering reopening the workspace?
- Does the nature of the work require face-to-face interaction?
- Have any employees expressed a desire to return? Have any expressed a desire to keep working remotely?
- Do hiring managers want to continue building the remote-work model to expand the future hiring pool beyond one geographic location?
- Are people feeling isolated and craving in-person connection with their colleagues and/or the people they serve?

### Why reopen the space? (cont'd)

- Are leaders and managers struggling to manage the work when they can't observe it in person?
- Are people distracted and overwhelmed at home? Will they be more productive when they are back in the workspace?
- Are you being influenced at any level by the sunk cost fallacy in relation to rent, mortgage, or utilities?

### What is mission critical about the physical workspace/providing services face-to-face?

- What organizational processes, programs, assets, or activities must happen in person?
- Can your organization do its work with all or some remote employees?
- What needs to be done that is impossible to do remotely?

### What costs are associated with this decision?

- What is the financial cost/gain of reopening?
  - What are the physical costs associated with reopening? How much will you need to spend on things to make your space safe? Will you be able to sustain recurring safety costs? What other costs might you incur if you reopen the space?
  - What are the physical costs of staying closed? Are there supplies your team will need to make working from home more efficient and productive? What are your financial liabilities when it comes to your space? What other costs might you incur if employees work from home?
  - Will some of your team members choose to not come back?
- What is the operational and programmatic cost/gain of reopening?
  - What did you stop doing, start doing, or continue to do over the past few months? How have these decisions impacted your strategic priorities for 2020 and beyond?
  - What are the costs of maintaining the same operations/programs that you have been running during the pandemic without returning to your intended plans for 2020?
  - What are the costs of changing your operations/programs to accommodate your original 2020 plan?

### What is the emotional and/or cultural cost/gain of reopening for the team?

- What costs might you incur if you reopen now? Are there team members with dependents or circumstances that will deter their return to the workplace? Is your team emotionally ready to return?
- What will you gain by reopening your workplace now? Will it be easier to build and nurture the kind of culture you want to create?
- Have you considered how DEIJ elements impact your reopening decision?
  - Who on your team—either individuals or identity groups—has been disproportionately affected by the pandemic and shut down?
  - Who (if anyone) on your team will be disproportionately affected by a decision to reopen?
  - Who (if anyone) on your team may need special accommodations/considerations in order to return to the workplace?
  - How can you help all your team members feel seen, heard, and cared for?

The decision to reopen is not a straightforward one. Employees have had different experiences over the past few months, and there may not be a one-size-fits-all approach to reopening your workspace.

If the decision is that you are not ready to reopen yet (or ever), consider what accommodations you will need to make for continued work from home, determine any further adjustments to operations and programs, and set a time to revisit this conversation in the future.

## RESOURCES

- [Gensler, U.S. Work from Home Survey 2020](#)
- Kim Hart, Axios, ["The downsides of remote work"](#)
- Erica Pandey, Axios, ["How the new workplace could leave parents behind"](#)
- Maria Cramer and Mihir Zaveri, The New York Times, ["What if You Don't Want to Go Back to the Office?"](#)
- Sarah Green Carmichael, Bloomberg Opinion, ["Google and Twitter Are Right. Workers Should Stay Home"](#)
- Jack Kelly, Forbes, ["Here are the Companies Leading the Work-From-Home Revolution"](#)
- Nick Routley, Visual Capitalist, ["How People and Companies Feel About Working Remotely"](#)
- Dana Wilkie, SHRM, ["Why are Companies Ending Remote Work?"](#)

## HOW TO REOPEN

This section is for organizations that plan to reopen their workspace. In reopening, you want to achieve these vital goals:

- Physical health and safety
- Mental and emotional health and well-being
- A strong team culture that strengthens the organization's work and future
- Adherence to principles of diversity, equity, inclusion, and justice (DEIJ)
- Legal compliance
- Productive, effective work that advances the mission

### RESUME OR RE-DREAM?

Upon the return to the workplace, many leaders and employees may be tempted to pick up where they left off in March 2020—a “resume” approach. Some organizations may be forced into this strategy by various constraints beyond their leadership’s control.

For organizations in these circumstances, a “resume” approach may be prudent and entirely appropriate.

Yet so much has happened since March 2020. Employees’ lives are different now and these differences are important not

Achieving those outcomes requires attention to many important details—physical changes for safety, HR policies for legal compliance and employee well-being, communications practice for ensuring smooth transitions and building trust, emotional practices for nurturing mental health and building a great team culture, and more. But before you can effectively address those details, you must know: What vision are you working toward? Are you rebuilding what already existed or are you building something new?

only for them as individuals, but also for their organizations.

Feelings, thoughts, values, and attitudes around how to approach work may have changed. **People have been through—and in many cases are still dealing with—trauma in their personal lives and in the community around them.**

The forced change in our work patterns, as well as the spotlight currently being shone on injustices, also provides an opportunity to act on dreams that may have had no chance for support just a few short months ago. A belief that change is desirable is more prevalent now than at any other time in recent memory.

Recognizing how much has changed, we recommend using this moment as an opportunity to reset—a chance to rethink, revise, and rebuild our organizations. The following questions may help you to frame discussions around this forward-looking approach:

- **Was your team able to stay connected while working remotely?** Even if this is a clear yes, a short reboarding may be helpful to smoothly transition your team back to the reality of sharing a workspace. And if the answer to this question is a certain no, think about how to build camaraderie. If people feel that they don’t know each other as well as they did pre-pandemic, or the level of trust is not where it once was, the work product may suffer. Consider planning a team meeting or a team activity (safely, appropriately

distanced, and/or outside if possible) to rebuild trust and increase feelings of team unity. Reminders about office guidelines or policies to promote respect and inclusion may also be in order.

- **Are people clear on the current organizational goals and priorities?** These have likely shifted during the pandemic, and it’s important to communicate any and all pivots clearly, and repeatedly, so that all employees can be on the same page regarding where to focus their efforts moving forward. Based on Leading Edge data, we know employees feel passionate about their organization’s mission and goals. Use this as a time to refocus the organization on what is most important, and make sure to adjust priorities as needed based on what’s happening in the field and in the world.

- **Are people in roles that best match their skills and abilities?** Have the needs of the organization changed in a way that requires jobs to change too? Do job descriptions match with each individual’s strengths and preferences while also aligning with the current and near-future needs of the organization? If not, consider having managers work with people in a collaborative process to rewrite job descriptions to match the new needs of the organization. What are each employee’s core strengths? Are they being empowered to use them to serve the mission?

**Are teams and workloads designed for the new realities and new opportunities?** This might be a good time to consider changing people's portfolios so that employees make full use of their skills to contribute in ways to the projects that best suit them. Examine how teams can better work together to support the overall mission.

How you answer these questions will affect all the details in the pages below: Who and how many people, and in what roles, will return to the workspace? What physical, emotional, and policy needs will these decisions affect?

## PHYSICAL AND MENTAL HEALTH

How much hand sanitizer do you need? We don't know, but countless organizations are creating excellent guidelines around physical safety in reopening workspaces. Rather than duplicate that work, we recommend the following resources to address physical and technical considerations:

### PHYSICAL HEALTH

#### Resource Hubs

- [Centers for Disease Control and Prevention \(CDC\) COVID-19 Resources](#)
- [U.S. Department of Labor COVID-19 Resources](#)
- [Occupational Safety and Health Administration \(OSHA\), COVID-19 Resources](#)

#### High-Risk Workers

- [CDC Guidance for Employers with High-Risk Workers \(p.46\)](#)
- [People Who Are at Higher Risk for Severe Illness](#)

#### Preparing the Workplace and Cleaning Guidelines

- [OSHA Guidance on Preparing Workplaces for COVID-19](#)
- [Cleaning and Disinfecting Guidelines](#)

### MENTAL HEALTH

#### For the Organization

- Alan Kohll, Forbes, [How to Create a Workplace That Supports Mental Health](#)
- Dori Meinert, SHRM, [How to Accommodate Employees with Mental Illness](#)
- Survey Monkey Study, [The State of Mental Health in the Workplace](#)
- [CDC Mental Health in the Workplace](#)

#### For the Individual

- [RUACH](#) connects Jewish care providers to individuals in need
- In New York City, [NYC Well - Talk. Text. Chat.](#) (Other cities may have similar resources.)
- SAMHSA, [2020 National Directory of Mental Health Treatment Facilities](#)
- [Finding Therapy](#), resources to help find mental health treatment services in your community
- Massachusetts General Hospital, [Mental Health Resources for Black, Indigenous, and People of Color \(BIPOC\)](#)
- [Help Yourself. Help Others.](#)

### HR POLICIES

Employee handbooks across organizations will likely need to be revised to ensure policies are aligned with changes undergone during the pandemic. Formal and informal policies may shift, and for most organizations, HR policy changes will be unavoidable due to the changes in work and workforce needs. As decisions are made around how to return to the workplace, clear HR policies will help your team navigate its new normal.

Most organizations review and update their employee handbooks once a year to

ensure continuing compliance with federal, state, and local employment laws and regulations. If a full review of the employee handbook is not feasible at this time, consider making addendums to policies through memos until the full review of the employee handbook is complete.

### RESOURCE

- [Leading Edge, Employee Handbook Best Practices](#)

There are two facets to consider when revisiting HR policies—the tactical and the human. Both will be essential in reviewing and revising policies to reopen the workplace.

### The Tactical and the Human

Some HR policies will need straightforward changes based on how you plan to return to the workplace—staggering schedules, creating flexible work hours, etc. There may have been informal agreements created during the pandemic that you may want to formalize. Based on local and state guidelines, procedural policies such as safety and hygiene requirements may be mandatory. Other questions many organizations may confront include:

- Do employees have to use paid time off (PTO) if they contract COVID-19?
  - » Does this policy differ based on whether the case is diagnosed or presumed?
- What if an employee's dependent contracts COVID-19? If the employee needs to stay home due to exposure, not illness, do they have to use PTO?
- What should team members do if they come in contact with a constituent who seems sick?
- For any employees who have more than one job, is it acceptable if their other job puts them in contact with the public? Does that affect their status at this workplace?
- Will employees have to agree to ongoing COVID-19 testing?

More nuanced changes to HR policies may be needed to accommodate the team's needs. People have experienced a fair amount of trauma and will need

support, empathy, and kindness during the transition back and subsequent months. Using HR policies to formalize some of this will help people feel supported and cared for on an institutional level.

Creating policies while planning to reopen will require considering how employees will be treated, the needs of the organization, and what is practically needed to get the job done. What do your current policies look like? Are they one-size-fits-all? Or will they be amended on a case-by-case basis? Is a hybrid policy possible to allow for flexibility without creating an HR nightmare? See below for some concrete examples of policies you might consider.

#### EQUALITY vs. EQUITY

Organizations may decide to create policies and procedures that apply equally across all departments, roles, and personal circumstances. This approach mitigates feelings of favoritism and unfair treatment. A potential downside to having an **"equality-centered" approach** is that because roles, personal circumstances, and experiences differ, some employees will be better off under the equal-treatment policy and some will struggle more.

On the other hand, you may decide that **"an equity-focused" approach** is best for the organization. Equitable policies take into consideration a number of different factors (e.g., role, role requirements, personal circumstances, identity groups, etc.) that affect how the individual experiences work. This approach allows organizations to customize policy based on the situation and need. This approach, however, can lead to potential

feelings of unfairness and favoritism. There is also an additional strain on the HR department/HR professional in managing the customizations made for each individual.

If possible, during this time, we recommend an equity approach because individual circumstances, as well as identity group disparities, matter now more than ever. **Previously, people could adapt their lifestyle to conform to the needs of their work, but in today's climate, it may be impossible for some employees to conform to blanket policies related to certain workplace practices (hours, location, etc.).** Leaders can mitigate feelings of unfairness that may arise in response by presenting the equity approach to policies as part of the larger project of fostering employee well-being, and communicating clearly to employees why taking individual needs and circumstances into account can allow for an environment that supports everyone.

#### ORGANIZATIONAL NEEDS vs. TEAM NEEDS

Organizations have gone through a lot over the last few months: closing the workplace, moving programs online, reconfiguring fundraising campaigns, recalibrating strategic priorities, adjusting to client and community needs, etc. As you revisit HR policies or build new ones, consider what the organization needs in order to thrive. Fulfilling the organization's mission, living its values, and getting back on track with 2020 plans are just some of the elements you may consider when assessing organizational needs.

Balancing organizational needs with the team's needs will be challenging at times. Not all jobs within the organization are created equal. There may be roles that cannot avoid face-to-face contact, and some that can be easily done from home. Making accommodations and building policies around the actual job requirements may unearth certain inequities. Reconciling these inequities will be challenging and at times impossible. Think about what practical accommodations you can make, where managers can be flexible, the actual vs. perceived job requirements, etc. Be sure, as well, to communicate clearly and empathetically with staff about what policies are and, critically, why you reached them. **(See more below in "Communicating with Staff.")**

**Previously, people could adapt their lifestyle to conform to the needs of their work, but in today's climate, it may be impossible for some employees to conform to blanket policies related to certain workplace practices (hours, location, etc.).**

There will be tougher questions to navigate as workplaces open and teams return. Anxiety, mental health concerns, and variances in comfort levels will be some of the challenges to navigate and address through HR policies, both formal and

informal. You will have to decide how to approach those struggling to return to the workplace. Think about:

- What support can you offer?
- How long of an adjustment period can the organization afford?
- What will help struggling team members feel ready to return?

Regardless of the specific decisions reached, employees will appreciate leaders who remain transparently true to the organization's values and act with empathy and kindness.

## RESOURCES

### Employer Rights, Employee Rights, and Labor Laws

- [U.S. Department of Labor Return-to-Work Toolkit](#)
- [Paid Leave Under the Families First Coronavirus Response Act](#)
- [Return to Work Guidelines and Requirements for Employers](#)

### Examples of Return-to-Work Policies

- [Example Return-to-Work Policies from SHRM](#)
- [Rabbinical Assembly, Jewish Values Regarding Physical Reopening of Our Institutions](#)

## COMMUNICATING WITH STAFF

**Employees are a key audience.** You need your people to feel okay in order to have an effective workforce. What do workers need to hear and see in order to feel comfortable with the reopening decision and plans? Are leaders communicating enough so that employees know exactly what to expect?

Without the right internal communications processes, you might present the safest and most supportive, creative, and

effective reopening plans possible only to watch employees greet them with confusion, frustration, fear, or even hostility. **Maintain clear, sensitive, and ongoing two-way communication, and employees will be more likely to rise to meet even the most difficult challenges the organization faces with equanimity.**

Here are 10 principles of internal communications for reopening the workplace (and maybe beyond):

## 10 PRINCIPLES OF INTERNAL COMMUNICATIONS

### 1 LISTEN FIRST.

Employees will listen better when they also feel heard. This principle should be a constant in a healthy organizational culture, of course, but in this case it means that leaders should seek employees' ideas and ask their feelings and concerns about reopening throughout the reopening process: while deciding whether to reopen, while planning how and when, and during the transition beyond. **This doesn't mean that each employee gets a vote on the decision, but rather that the organization recognizes and hears how people are feeling.**

The process of listening to employees will differ based on the organization's size, operations, and needs, but the important point is that **gathering input should be proactive.** Managers should engage individual employees, ideally one-on-one or in small groups, to draw them out. This is as much about building trust and engagement as it is about getting honest and detailed feedback. Both are vital, and both require real conversation.

### 2 COMMUNICATE THE DECISION-MAKING PROCESS.

Leaders take the time to keep important stakeholders informed: board members, funders, partner organizations, etc. Leaders should also **keep in mind that employees are a vital stakeholder group for organizations.** Since reopening decisions have such a large impact on their daily lives, it's ideal to keep team members in the loop about the process. Let employees know when deliberations are happening and when decisions are expected. This can be part of the same conversations as gathering staff input. Even when there isn't a clear answer yet, people appreciate understanding what you know, what you don't know, and a general timeline for a decision.

### 3 ANNOUNCE DECISIONS PROMPTLY AND CLEARLY.

Announce new policies clearly as soon as decisions have been reached, unless there's a firm need to delay the announcement. **Team members will appreciate having time to digest the news** and prepare themselves logically and emotionally. Make the effort to ensure that any updates or changes to organizational policies are stored in an easily accessible location so that employees do not have to ask where to find them.

### 4 GIVE REASONS.

Announcements of new policy should cover the classic five Ws: who, what, where, when, and why. **Don't neglect the "why."** Employees will feel more invested in these decisions if they understand the rationale for them and the challenges and trade-offs leaders faced in making these decisions. Explicitly acknowledging the costs and downsides of the chosen course of action, while also explaining why those costs are worth bearing, will also help employees feel that their coming challenges are seen.

## 5 BE OPEN AND HONEST, EVEN AROUND JOB LOSSES & OTHER DIFFICULT CHOICES.

For organizations that have implemented furloughs, layoffs, or salary reductions in recent months, employees are still feeling the effects. Some may be wondering if they are next on the list to be laid off or furloughed. Others whose friends are now unemployed are likely dealing with sadness and guilt. Those dealing with salary reductions are adjusting to a lower income and wondering if their salaries will be decreased further. **These are extremely challenging issues and there's no way to make conversations about difficult issues easy (especially over a video call!), but transparency, openness, honesty, and empathy can make them as smooth, respectful, and constructive as possible.**

## 6 SUPPORT PEOPLE AND MAKE SURE THEY KNOW IT.

Specify not only whom employees should ask for support during the transition, but also when and how employees should engage them. **Some team members may need accommodations, exceptions, or flexibility.** The rest will need emotional and motivational support, appreciation, conversation, and simple human presence.

## 7 EMPOWER PEOPLE TO ACT AND CHOOSE.

People want to feel that they are autonomous, with options to pursue and meaningful actions they can take. Identify ways employees can prepare for their own success during the transition, ways they can help colleagues, ways they can help the organization succeed, and ways they can provide feedback and ideas. **Identify choices people can make for themselves.** For example, there may be smaller decisions to make about where a team gathers for meetings or when people want to arrive and depart that can be left up to individual employees to decide. This gives them agency and control over their return to the workplace.

## 8 CONVEY APPRECIATION.

People want to know that their efforts, struggles, and challenges are understood and appreciated. **Keep gratitude in your communications at every stage.**

## 9 SHARE PROGRESS ALONG THE WAY.

On any significant journey, it can be motivating to see a map that shows us where we are. **Mark milestone moments as opportunities for rededication, celebration, and reflection—and connection with staff.** Reopening Day One and the one-month, three-month (one-quarter), six-month, and one-year anniversaries of reopening might all be worth marking. Use rituals—whether Jewishly informed or more general—to help bind the team together and provide opportunities for valuable conversation.

## 10 KEEP LISTENING AND ADAPTING.

Check in with employees frequently throughout the reopening process. Reopening Day is just the first day of a larger transition. Work with team members to determine what's working well, what areas need change or more support, how preexisting concerns have been playing out, and what new concerns are arising. **The plan and process around reopening may need to shift and flex based on how things are going.**

## RESOURCES

- The Pulse Survey from Leading Edge is an open-source survey tool that can help leaders check in with their people frequently over time.
- We've also developed [Returning to the Workplace Survey Questions](#) to use in Pulse Surveys.

## BOARD-EXECUTIVE RELATIONSHIPS

The role that board members play in this process is different for each organization. What is most important is figuring out how the professional leadership wants to engage the board and how board members wish to be involved in the reopening conversation and process. Since no board or leader has been through this kind of situation before, there is likely to be murkiness around how decisions are made related to reopening the workplace.

**A crucial step is for the board chair and the CEO to talk through the way these decisions will be made and how they will work together to keep the board, professionals, and community informed.**

In planning for a smooth process, be sure to consider the make-up of your board: what professional or lay experience they bring to the table, what ages and identity groups they represent, and what other concerns they personally face at this time. As always it's also worth examining who isn't at the table — what groups or constituencies might be underrepresented on the board.

Senior leaders always—and especially

now—need to keep regular and transparent communication with the board about safety, finances, and employee readiness. Establish an ongoing cadence of board communication; in times like these, there is no such thing as over-communication. Executives and boards should also discuss in advance exactly how the executive will alert board members if there is an urgent and immediate decision that the board needs to make (e.g., a group text, an email with a certain subject line, a phone call to a set of administrative assistants, etc.).

For every material change that takes place, explain to the board why this change is happening from a financial, mission, staffing, and well-being perspective, and its implications. The more information you can provide to board members, the easier it will be to garner their feedback and support, and move forward.

From workplace changes to shifts in programming or services, board members should be fully briefed as executives make decisions, and board members should have the information they need to publicly

support those decisions. Working with the board chair, the senior leadership can determine how the board can best be involved in these types of decisions. Some boards may want to vote on certain items, while others may rely on the actions of

the CEO/executive director. These choices are likely to vary across organizations. A key element to remember when thinking through a decision-making protocol is how quickly decisions need to be made so that there are no bottlenecks.

## THE PERSONAL TOUCH: Leading with Emotional Intelligence

### MOVING BEYOND BASIC NEEDS

When the pandemic started in March 2020, people's basic needs were front and center—for good reason. Medical professionals worked tirelessly to heal sick patients, communities rallied to help alleviate food insecurity, mortgage companies paused payments, federal aid programs were launched, and unemployment criteria were adjusted.

Abraham Maslow's theory (chart below) explains that people have a hierarchy of needs, with the requirements for each tier needing to be met before the next level can be addressed.



The first tier includes the most basic needs for food, water, warmth, and rest, and the next tier comprises safety and security; higher levels delve into relationships, self-esteem, feelings of accomplishment, and, ultimately, achieving one's full potential.

**As you work to support your people, it's important not to overemphasize basic needs and neglect other aspects of health and well-being.** Employees need to be supported in their ability to feel a sense of purpose, in their need to stay connected with colleagues, and in their desire for a sense of belonging to a wider community. Consider how your organization is positioned to help your people fulfill these larger needs during a return to the workplace.

### EMPATHETIC CHECK-INS

Employees will need more than new maintenance protocols and staggered schedules to feel safe at work. Leaders and managers should check in with employees about their well-being and give employees the chance to discuss how they are feeling about being back in the office and their work.

Those who inherently have a more sensitive approach to management may already feel equipped to initiate these chats. Others may need to overcome an assumption that these conversations are a waste of time or too personal for the workplace. These are valid concerns. Keep this part of the check-in short—five to 10 minutes—so that the remaining time will focus on the work. The goal is to show genuine interest, give the employee the chance to open up, find quick solutions together, and get an ongoing pulse on how that employee is doing. Even if the direct report doesn't want to provide substantive answers to these questions, simply knowing that their manager took the time to ask is important.

Some questions that managers might use to begin these conversations include:

- How is everything going for you? How are you feeling being back at work?
- How has your focus been at work now that we are back in the workplace?
- What makes you feel safe being back in the workplace? What, if anything, would make you feel safer in the workplace?
- Is there anything that you need to get your work done? Is there anything that you need from me?

Notice the **warning signs** when someone is struggling. **Leaders and managers should do their best to stay in close contact with employees so that they are attuned to positive and negative signals.** For large organizations, this becomes a task for everyone who manages teams. Just being aware of when someone is having an off day and taking the time to listen can make a difference. If they do open up to you about something that's not going well,

try to help them be solution-oriented if at all possible. But sometimes a manager can't do much to fix the problem, and that's okay. Sometimes employees just want to be heard and understood.

### PUT ON YOUR OWN MASK FIRST

During the reopening process, leaders may focus only on what is best for their people and may end up neglecting their own needs. In the long term, this will be detrimental to everyone's interests. As flight attendants remind us on airplanes, passengers should secure their own masks first before helping others, lest they faint before they can assist anyone; likewise, leaders must take care of themselves before they can truly take care of those around them. They should lean on supports—such as a coach, mentors, and peers.

### THINK ABOUT INCLUSIVITY AS BROADLY AS POSSIBLE

Consider all different scenarios that might be facing your employees—issues and concerns that are known and those that are not. Although this can feel overwhelming and paralyzing to think about, it may be helpful for some leaders to consider deeply the experiences of others as they think this through. For example, think about employees who:

- » Are terrified of losing their jobs
- » Live with someone who is immunocompromised or are personally immunocompromised
- » Are People of Color and are holding so much
- » Are single parents
- » Are juggling child care responsibilities
- » Are facing lingering symptoms from having COVID-19 themselves

- » Are grieving and forever changed due to the loss of someone in their lives over the past few months (to COVID-19 or something else)
- » Live with mental health challenges that have been exacerbated by events of 2020
- » Live alone and have been isolated and lonely for the past few months
- » Are responsible for an elder or another dependent adult
- » Lost all or part of their pay over the past few months (furloughed) and are trying to make ends meet
- » Are new to the job or are close to retirement
- » Don't speak English as a first language and may have more difficulty navigating complicated COVID-19 information in English or learning new systems from English materials

## THE ROLE OF MANAGERS

- **Managers weren't trained for this.** They will be the first line of defense and line of support to employees and may need training and support to be the type of managers employees need and deserve.
- Leaders may know which managers have excellent **emotional intelligence** and which ones don't. If so, think about creating a cross-organizational wellness team or support team that people can rely on for the type of support they need and cannot get from their direct manager. Another option is to have return-to-the-workplace buddies/mentors to check in with people periodically.
- Managers (and leaders) will probably need to **communicate more and**

**differently** than they have in the past. If some people are remote and some are in-person, that creates a management challenge. Managers may need to create **communication plans** that lay out how/when/what they share with each employee.

- **Managers may need more support too.** Think about establishing manager buddies/partners so each manager has another manager from a different department they can talk with regularly about challenges. They need somewhere to go for advice and having another manager as an advisor might be helpful.
- Managers who were used to managing people and their work have been in their employees' homes with their families via video and now may have different relationships with their direct reports. They will want to think about how to **reestablish the most effective relationship and appropriate boundaries** as they shift back to the workplace.

## SEEKING OUR BLIND SPOTS AND GOOD HONEST FEEDBACK

Consider all the roles at your organization. Think about who fills those roles, considering the issue through a lens of diversity, equity, inclusion, and justice (DEIJ). Address the inequity, by identifying it, naming it, and finding ways to mitigate it—because roles are not the same and people won't be affected or treated the same. As you consider the roles and assignments within the organization, be honest about what is a "must have" and what is a "nice to have."

## WHEN TO REOPEN

For organizations that decide to reopen the workspace, the next question is when to do so. The timing must follow from the organization's preparedness to begin an effective reopening process—in all the ways discussed above. Furthermore, even when all the necessary conditions are met, leaders should set a timeline that gives employees ample time to prepare between the announcement and the reopening—ideally 30 days or more.

This checklist can help determine whether an organization is ready to set a date for Day One:

### Physical requirements for reopening

- Green light to reopen from state/local government
- Updated policies for compliance with current legal and regulatory requirements (OSHA, EEOC, etc.)
- Physical health of the team (self-screening guidelines, temperature checks, testing requirements, etc.)
- Physical equipment (physical barriers, antibacterial dispensers, disinfecting supplies, floor markings, temperature scanners, etc.)
- Getting-to-work plan (public transportation, parking lot regulations, etc.)
- Space plan (safe distance markers, traffic flow signage, crowd-control plan, etc.)
- Sanitation plan (cleaning services, air flow, masks, contactless entry, etc.)
- Communication (signage, written policies, explanation of physical changes to the workplace, etc.)

### Human requirements for reopening

- Mental health of the team (self-assessment guidelines, mental health checks and check-ins, mental health support services, comfort level with returning to the workplace, etc.)
- Reboarding plan (reintroduction to the workplace; updated HR policies; a plan for the first day, first week, first month, and beyond; etc.)
- Management plan (management training/retraining, management tools, etc.)

## RESOURCES

### Deciding When to Reopen

- CDC Tool, [Deciding When to Open \(Decision Tree\)](#)

### Other Resources

- [LifeLabs, Changing Behaviors: 5 ways to make return to work brain-friendly](#)
- [HR Daily Advisor, Return-to-Workplace Prep—A Case Study Based on 900+ Companies](#)
- [Dana Brownlee, Forbes, An 8 Point Discussion Guide for Developing a Return to Work Plan Amid Coronavirus](#)
- [LifeLabs Learning, Return-To-Workplace \(RTW\) Discussion Guide](#)
- [Jennifer Liu, CNBC, What it means to be an anti-racist company](#)
- [Andrés Spokoyny and Sigal Yaniv Feller, eJewish Philanthropy, Navigating the Post-Pandemic Future in North America and Israel](#)

# CHECKLISTS

## BEFORE DAY ONE

- Set up the space and the necessary technology.
- Clearly communicate plans/protocols/procedures for reentering safely.
- Communicate new/updated/existing HR policies.
- Prepare staff for what to expect on Day One and beyond.
- Set up mental health and psychological safety support systems.
- Communicate mental health support and services that will be available.
- Schedule manager check-ins and readiness assessments (e.g., accommodations to work schedule, commute challenges, etc.).
- Have management clarify roles/responsibilities/portfolios and set expectations.
- Schedule team meetings and/or all-staff meetings.

# CHECKLISTS

## DAY ONE

- ❑ Mark the occasion—a ritual, a text, the *shehechiyanu blessing*, etc.
- ❑ Conduct an orientation/walk-through that showcases new safety procedures and physical changes to the workspace.
- ❑ Conduct an orientation on new ongoing mental health support services and how to access them.
- ❑ Engage safely in a team/group activity or meal to reconnect.
- ❑ Review new/updated/existing HR policies with staff.
- ❑ Open office hours with HR and managers, and encourage the team to ask any clarifying questions.

# CHECKLISTS

## WEEK ONE

- ❑ Mark the occasion—making it through week one is a win!
- ❑ Schedule check-ins between supervisors and supervisees to assess and reassess how things are going.
- ❑ Host a team meeting to discuss progress so far.
- ❑ Remind team members about the access they have to ongoing mental health services, and encourage team members to take advantage of these services.
- ❑ Engage safely in a team/group activity or meal to reconnect.
- ❑ Evaluate the reopening process, either by survey or through feedback groups or individual conversations.
- ❑ Send a “State of the Organization” communication about successes and challenges so far.
- ❑ Host a town hall/“ask me anything” forum for staff to ask questions, voice concerns, etc.
- ❑ Continue office hours with HR and managers, and encourage the team to ask any clarifying questions.

# CHECKLISTS

## MONTH ONE & BEYOND

- Remind team members about the access they have to ongoing mental health services, and encourage team members to take advantage of these services.
- Check in to see how people are feeling through an in-person forum or a pulse survey.
- Continue to evaluate the reopening process, either by survey or through feedback groups or individual conversations.
- Maintain check-ins between supervisors and supervisees to assess and reassess how things are going.
- Assess organizational productivity to determine other supports the team might need.
- Create a feedback loop to check the team's adjustment to being back in the workplace.
- Celebrate the one-month, three-month (one-quarter), six-month, and one-year anniversaries of "Reopening Day One."

## ENDNOTE

When the Israelites finished dedicating the Tabernacle in the wilderness ([Leviticus 9](#)), the very next thing to happen was a catastrophe: Aaron's sons, Nadab and Abihu, failed to follow cultic procedures properly and died ([Leviticus 10:1-2](#)). By contrast, when the administration of King Solomon finished consecrating the First Temple in Jerusalem ([1 Kings 8](#)), God immediately and explicitly announced that the project had Divine approval ([1 Kings 9:1-3](#)).

Beginnings matter.

Yet the beginning of any story is deeply connected to the middle, the end, and the new beginnings that may come from an ending. Despite the tragedy of losing Nadab and Abihu, along with other calamities, the next generation of Israelites in the wilderness did eventually reach the Promised Land... only later to be exiled... and eventually to return. Despite a perfect beginning, King Solomon's Temple eventually fell... and was later rebuilt.

**Reopening our workplaces is not an isolated episode in the life of our organizations. It is a journey.**

Throughout that journey, if we keep our eyes firmly on the missions of our organizations—and if we nurture the health, safety, well-being, and fulfillment of ourselves and our colleagues—we can help our communities, our institutions, and the people we work with thrive.

## **ABOUT LEADING EDGE**

Founded in 2014, Leading Edge influences and inspires dramatic change in how Jewish organizations attract, develop, and retain top talent. Leading Edge's flagship program areas focus on supporting and developing CEOs, strengthening partnerships between lay leaders and professionals, and helping to create leading places to work.

