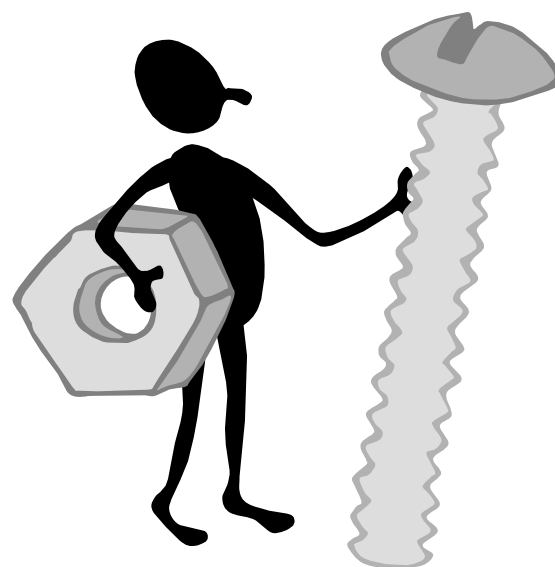




Tools of the Trade: Preparation for Supervision



Participant's Guide

November 26, 2007



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Bob Pollack
Shannon Stokes
Barbara Sullivan
Mimi Tarpley-Benkoski
Cathy Tencza, Tencza Designs
LeAnn Tingle
Mark Todd

For more information on this training program, please contact the Mimi Tarpley-Benkoski at (404) 550-7915 or email: mtbenkoski@dhr.state.ga.us or Lynda Brasher at (404) 550-7915 or e-mail: lybrasher@dhr.state.ga.us.



Overview

Who the Training is For

The target population for this course is new supervisors in OFI and Social Services. The Steering Committee for this training is comprised of people from both OFI and Social Services, and there was unanimous agreement that their skill needs were very similar; furthermore, it was felt that the networking and sharing involved in training a heterogeneous group would be beneficial for all. The title of the training, *Training for New Family Services Supervisors*, reflects this blend of OFI and Social Services.

This training is to take place during a supervisor's first six months on the job, and it is part of the certification process for Social Services.

For maximum effectiveness, the classroom should be conducted with groups of no fewer than six and no more than 20 participants.

Module Rationale

DHR supervisors have a quick learning curve and a variety of training needs. First, they must make the transition from being an individual contributor to being a supervisor who gets work done through others. It is often difficult for former case managers to give up the case work when they have set high standards for themselves and felt they met those standards. It is also hard to give up being a friend and peer of everyone in the office when being a supervisor must define the relationship.

Making the transition to supervisor is more than just a mind set. It is skill set as well. Effective supervisors use a variety of interpersonal skills and processes to manage the people of the unit. These include communication, team building, performance management, building relationships, and coaching. In addition to this critical area of people management is management of the unit's work, which includes using data, planning, managing emergencies and crises, and managing the overall caseload of the unit.



Clearly, supervisors have a lot on their plates. So what do they bring to the table, and what can the agency do to help build the right mind set, skill set, and tool set of new supervisors? New supervisors bring a variety of skills and expertise. They most likely have DHR experience, but they may come from outside the department. They may be hired into a supervisory area that is or is not in their area of program expertise or in a geographical area that is familiar to them. They may or may not have previous supervisory experience in another agency or state.

In order to support social services supervisors in learning their jobs, DHR has a supervisory certification program that they must complete during their first six months. It includes Internet training, field-based training with e-mentoring, observations, management ratings, PMP training, a three-day overview called *Skills for Successful Supervision*, and a six-day classroom training experience. It is this classroom experience which is addressed by this design document.

Module Goal

Upon completion of this training, you will be able to:

Identify and perform appropriate supervisory actions in a variety of situations, in accordance with department mission and values and supervisor's own PMF.

Module Design and Objectives

This program includes two three-day sessions for a total of six days of training. This instructor-led classroom training session complements other training offered to new supervisors by the department. It includes presentation, large and small group activities, reflection, reading, and application.

Sections and objectives. The objectives for each section are listed below, organized by the various sections of the training program.

Introduction:

1. Identify differences in roles and responsibilities between a case manager and a supervisor.
2. Identify transitioning from case manager to supervisor as an experience involving loss as well as gain.



Making the Transition to Supervisor:

3. Describe the meaning of statements in the County Director's PMF and identify high-priority items.
4. Complete a self-evaluation to identify areas of strength and need.
5. Complete a developmental plan to address at least one area of strength and one area of need (consider the following factors: new county, new program area, policy, leadership skills).
6. Identify differences in roles and responsibilities between a case manager and a supervisor.
7. Identify the three main functions of a supervisor using Kadushin's framework.
8. Given a list of demands on your time and the time of your staff, identify which tasks are most important.
9. Describe ways that supervisors can communicate, process, model, and reinforce values.
10. Identify dos and don'ts of moving into a new role and team.
11. Given a variety of scenarios, identify the best strategies and actions for the supervisor, based on the PMF and department mission and values.

Communicating:

12. Identify urgent and routine information that needs to be communicated to supervisor, peers, and staff.
13. Identify the most effective ways to deliver/disseminate different types of information (e.g., unit meeting, e-mail, impromptu meeting, in-person discussion).
14. Demonstrate active listening skills.
15. Given a request for information or comment, identify the correct response.
16. Describe key agenda items for unit meeting.
17. Demonstrate how to conduct a unit meeting and scheduled conference with staff or immediate supervisor.
18. Identify strategies for redirecting staff and regaining control during challenging meetings and conferences.
19. Describe procedures for developing agendas and conducting scheduled monthly conferences and unit meetings.



Coaching:

20. Identify goal of coaching.
21. Identify appropriate expectations for staff.
22. Given a specific coaching situation, identify the best approach and most appropriate strategies (e.g., feedback, modeling, teaching).
23. Identify ways to present and discuss problems in light of strengths.
24. Given a description of a coaching situation identify whether supervisor took the correct actions.
25. Demonstrate how to plan and facilitate a discussion around performance. Demonstrate how to provide feedback, model, direct, and teach.
26. Identify stages of Case Worker Development.
27. Identify strategies for self-care.
28. Identify causes of Case Worker stress.
29. Identify ways to reinforce desired behavior.

Planning and Managing Unit Work:

30. Identify the ability to set and assess unit goals.
31. Describe how to communicate expectations in a clear, positive, respectful manner.
32. Identify areas for which a supervisor must set expectations.
33. Given the workload of the unit and the resources available, determine the best way of meeting goals.
34. Describe value of delegating.
35. Identify tasks that may and may not be delegated.
36. Identify methods used for delegation.
37. Given a description of potential crisis situation, identify proactive vs. reactive steps to deal with it.
38. Identify strategies to reduce the need for crisis management by proactive planning.
39. Identify strategies to improve time management.



Building Better Relationships:

- 40. Identify critical relationships.
- 41. Identify the treatment of "clients as resources" as a hallmark of a positive customer focused organization.
- 42. Demonstrate use of "Solution Based Questions" as a strategy to develop Case Manager and a way to treat them as "resources."
- 43. Identify ways to involve unit in improving their own service standards.
- 44. Recognize how "parallel process" can affect clients and families.
- 45. Identify best practices when working with partner agencies and others in DFCS
- 46. Identify purposes for talking to a variety of groups.
- 47. Demonstrate how to speak formally and informally to a variety of groups.

Using Data:

- 48. Demonstrate how data can be used to make decisions that help us do the "right work, right way."
- 49. Identify the seven goals of the CFSR—Child and Family Services Review.
- 50. Identify measures of individual and unit performance.
- 51. Describe the purpose of process of audits.

Team Building:

- 52. Identify actions that a new supervisor can take to promote team building.
- 53. Identify the strengths and weaknesses of the unit as a team and develop a plan for addressing areas of greatest need.
- 54. Given a description of a team, identify its stage of development.

Managing Performance:

- 55. Identify what to include in a Productivity file (Performance Diary) and how to use it.
- 56. Identify the "Four Laws of Performance."
- 57. Identify the purpose of case review tool to improve individual and group performance.
- 58. Identify requirements for number of cases to be reviewed.
- 59. Identify strategies for motivating individuals, work group and self.



Recommended Readings

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Winget, Larry (ed.). *Only the Best on Leadership*. Tulsa, OK: Win Publications. 1996.

Zenger, John H. *22 Management Secrets to Achieve More With Less*. New York: McGraw-Hill. 1997.



Agenda

Note: All times are estimates; the needs of the group may influence the exact time for each section.

Day One

Introduction and Overview

- Introductions
- Course Overview

Making the Transition to Supervisor

- Thinking About the Transition
- Managing Your Own Change
- Hello, Goodbye
- The Role of Supervisor
- Foundational Guides
- In Box Exercise
- Advice from Experienced Supervisors
- Self-Assessment and Development Planning
- Summary

Day Two

Communicating

- Supervisor's Communication Connections
- Communication Guidelines
- Communication Styles
- Planning for Communication
- In Box Activity: Selecting a Method
- In Box Activity: Planning Communications
- Communications Skills Practice
- Communications Summary



Day Three

Coaching

- Introduction to Coaching
- Presenting Expectations
- Praising Desired Behavior: Overview
- Praising Desired Behavior: Skills Practice
- Correcting Problem Performance: Overview
- Correcting Problem Performance: Skills Practice
- In Box Exercise
- Summary

Day Four

Planning and Managing Unit Work

- Introduction to Planning and Managing Unit Work
- The Planning Game
- Planning Application
- Organizing: Start With the End in Mind
- Establishing Structures
- Presenting Expectations
- Introduction to Delegation
- In Box Exercise: What to Delegate
- Teamwork Within a Framework
- Summary

Day Five

Building Better Relationships

- What Are Our Critical Relationships?
- People as Resources
- Building Relationships With Staff
- Building Relationships With Families
- Building a Relationship With Your Supervisor
- Building Relationships With Peers
- Building Relationships With Partner Agencies
- Building Relationships With Community Agencies
- In Box Exercise
- Summary



Using Data

- Keeping Track
- Using Data to Inform Decisions
- Summary

Team Building.....

- Introduction to Team Building
- Stages of Team Development
- Summary

Day Six

Team Building (continued).....

- Characteristics of Effective Teams
- Summary

Managing Performance

- Introduction to Managing Performance
- How to Measure Performance
- Confronting Unacceptable Behavior
- Motivation, Reward, and Staff Retention
- Training
- Summary

Summary

- Closing Thoughts
- Course Content Summary: Dozens Activity
- Closing Up the Tool Shop



Hello, Goodbye

Directions: The transition to supervisor goes most smoothly when you understand and embrace the way your role, scope of influence, relationships, and responsibilities change. We're going to help you do this in a deliberate manner.

In the columns below, write down what you are gaining as a supervisor and what you are losing. It is time to say "hello" to new ways of acting and thinking and "goodbye" to the old!

Hello—What I Am Gaining	Goodbye—What I Am Losing

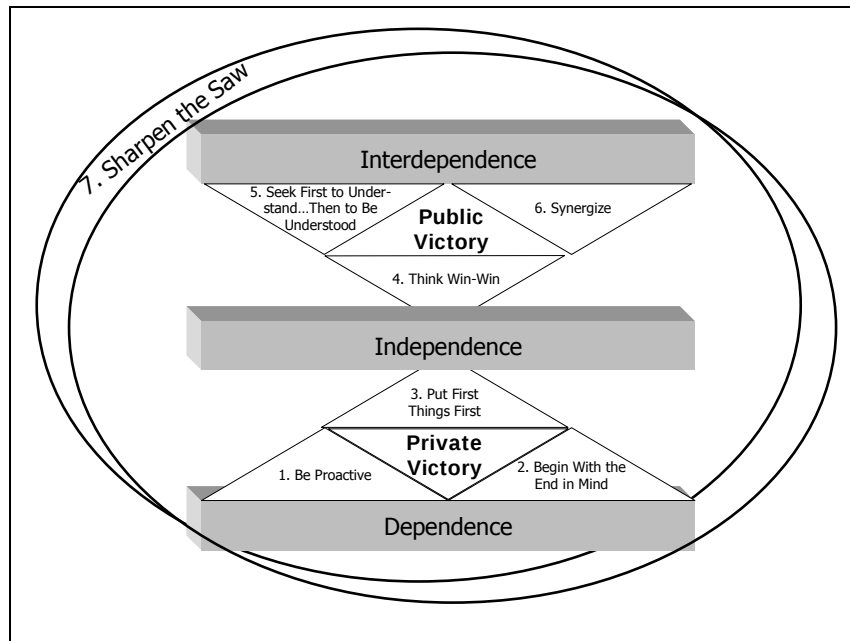


Worksheet: Blockbuster

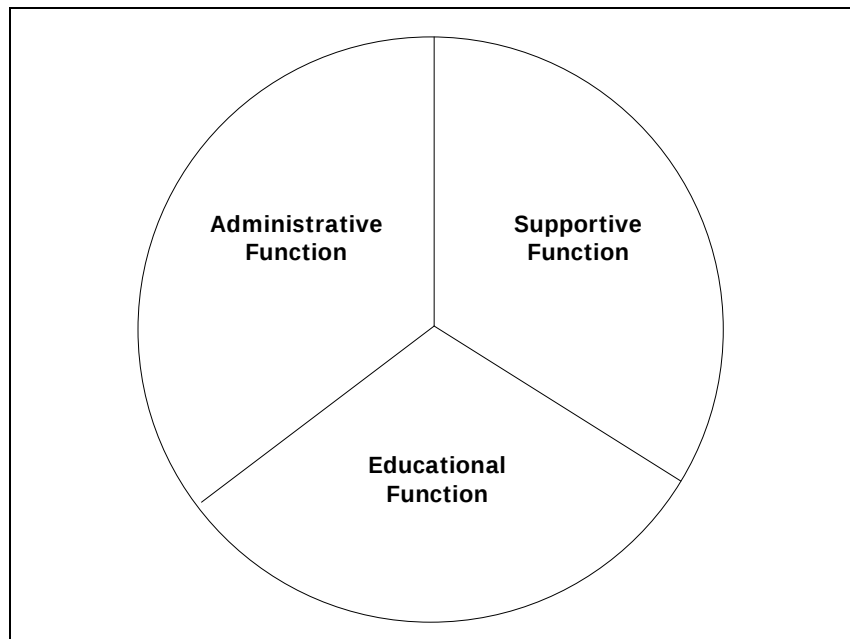
Describe the Horror:	Describe the Drama:
Describe the Action:	Describe the Suspense:
Describe the Comedy:	Describe the Science Fiction:



Frameworks For Understanding Supervision



Framework One, from Stephen R. Covey



Framework Two, from Alfred Kadushin



Mission, Vision, and Values

DHR Mission

The Georgia Department of Human Resources, in partnership with others, will effectively deliver compassionate, innovative, and accountable services to individuals, families, and communities.

DHR Vision for the Future

Georgians living safe, healthy, and self-reliant lives

Division of Family and Children's Services Values Statements

- Do not accept welfare and total dependence on government for any family.
- Expect adults to work; there is dignity in work, whether with the head or hand.
- Be a resource and support, not a substitute, for families.
- Expect every customer to invest/participate in his or her own recovery.
- Families are capable and responsible for making changes happen.
- We can best serve families by telling them and ourselves, the whole truth, as we see it, about their strengths and challenges.
- Serve people as close to home, family and community as possible.
- Give customers as much control over getting the information they need as technologically possible.
- Use data and information to help make decisions.
- Do not accept "business as usual"- it's not good enough.
- Spend government money like it's your own.
- Treat customers as if they were your own family.
- Make it faster, friendlier, and easier for people to deal with us.
- Reward our workforce for performance.
- Deliver services as if we were not the only one who could do that work.



Integrity (from Stephen Covey 7 Habits of Highly Effective People)

Integrity in an interdependent reality is simply this:
You treat everyone by the same set of principles. As you do, people will come to trust you. They may not at first appreciate the honest confrontational experiences such integrity might generate. Confrontation takes considerable courage, and many people would prefer to take the course of least resistance, belittling and criticizing, betraying confidences, or participating in gossip about others behind their backs.

But in the long run, people will trust and respect you if you are honest and open and kind with them. You care enough to confront. And to be trusted, it is said, is greater than to be loved.

In the long run, I am convinced; to be trusted will also be to be loved.

GUIDING PRINCIPLES, VALUES AND BELIEFS FOR SUPERVISION

- Supervisors should treat workers in the same way workers are expected to treat families.
- Supervisors are practice experts who offer guidance and direction to staff.
- Supervisors are responsible for ensuring that staff performance meets agency standards.
- Supervisors should educate and develop workers by modeling, coaching, and mentoring.
- Supervisors should support and motivate staff.
- Supervisors are the keepers of the agency culture.
- Supervisors are the first line of quality improvement in child welfare practice.
- Supervisors are responsible for the quality of services that children and families receive.
- Supervisors should define what future practice should look like, align staff with that vision, and inspire them to make it happen.
- Staff should have a supportive team that includes their supervisor and coworkers.
- Staff should be encouraged to identify and build on their strengths.
- Outcomes are best achieved when supervisors and workers collaborate.
- Supervision is the key to the effective delivery of services.
- Agency, unit, office, and worker data provide performance feedback that can be used to improve decision making and planning.
- Outcome data play a key role in creating better results for children and families.



Guiding Principles for New Supervisors: Advice from Experienced Supervisors

1. Embrace your new role; leave your old role behind.
2. Focus on outcomes. Begin with the end in mind, and remember that the end doesn't justify the means.
3. Focus on solutions; build on strengths.
4. Make decisions based good judgment guided by department mission, vision, values, policy, legal mandates, and goals.
5. Embrace the diversity of your staff and learn how to help each one make a contribution to outcomes in his/her own way.
6. Be fair. Be consistent. Be trustworthy. Be a positive force.
7. Learn to be at peace when you know you've done your best.
8. Communicate with your supervisor, especially about priorities.
9. Rely on data, values, and family-centered practice principles to make decisions.
10. Remember: Nobody works well unsupervised.

Do's and Don'ts of Moving Into a New Role and Team

1. Ask about housekeeping rules.
2. Find out about break times.
3. Understand local customs and work habits (particularly if you are from a different generation, race, gender, or area than the majority).
4. Seek first to understand, then to shape, the unit culture.
5. Give respect for others' experience and knowledge.
6. Find out when and how supervisors network.



Self Assessment: Transitioning to Supervisor

Attitude	Disagree					Agree				
I seek responsibility.	1	2	3	4	5					
Becoming a respected supervisor is important to me.	1	2	3	4	5					
I enjoy helping others do a good job.	1	2	3	4	5					
I want to know more about human behavior.	1	2	3	4	5					
I want to climb the management ladder.	1	2	3	4	5					
I am anxious to learn and master supervisory skills.	1	2	3	4	5					
I like leadership situations.	1	2	3	4	5					
Working with a problem employee would be an interesting challenge.	1	2	3	4	5					
I intend to devote time to learn motivational skills.	1	2	3	4	5					
I'm excited about the opportunity to become a supervisor.	1	2	3	4	5					

40-50: Excellent attitude toward becoming a supervisor

25-40: Appear to have a few reservations

Under 25: Probably should consider another career path

Confidence	Disagree					Agree				
I'm not easily intimidated.	1	2	3	4	5					
Complex problems do not overwhelm me.	1	2	3	4	5					
If necessary, I can discipline those who require it.	1	2	3	4	5					
I can make a decision and stick with it.	1	2	3	4	5					
I am strong enough to defend a deserving employee to my superiors.	1	2	3	4	5					
I have enough confidence to be a good teacher.	1	2	3	4	5					
Speaking in public does not frighten me.	1	2	3	4	5					
I am no better than my employees, and my supervisors are no better than me.	1	2	3	4	5					
I do not avoid needed confrontations.	1	2	3	4	5					
I can say "no" when needed.	1	2	3	4	5					
I can accept criticism or negative feedback.	1	2	3	4	5					

If you scored 40 or above on both attitude and self-confidence, you have a winning combination as far as being a successful supervisor is concerned. If you scored lower on self-confidence than attitude, it is a signal that need to learn to take a firmer stand on those items relating to supervision. →



Characteristics	Disagree			Agree	
I remain positive under stress.	1	2	3	4	5
I take time to teach employees what I know.	1	2	3	4	5
I build and maintain mutually rewarding relationships with employees.	1	2	3	4	5
I set reasonable and consistent authority lines.	1	2	3	4	5
I am learning to delegate.	1	2	3	4	5
I have high standards.	1	2	3	4	5
I work at my communication style.	1	2	3	4	5
I can build teams to accomplish more than individuals can.	1	2	3	4	5

The items with high scores (in the chart above) are your strengths. You should build on these strengths as you grow as a supervisor. The areas with low scores indicate probable skill building needs.

Reality check: You may want to ask others you respect (peers, case managers, and your boss) to provide feedback on these items to make sure that your perceptions match those of others.

Summary

In the space below, identify three areas of greatest strength, using the self assessment results and other information you have about your abilities as a supervisor, and three areas of greatest weakness.

Strengths:

Needs:

Adapted from: McKnight, Wil and Elwood Chapman *The New Supervisor: Stepping Up With Confidence*. Los Altos, CA: Crisp Publications. 1997.



Supervisor's Development Plan

Directions: Select three areas that you want to develop. Include at least one strength and one need area. Also, consider whether you are entering a new county or new program area in which you need to learn new policy.

Then complete the second column. Identify possible ways you can build in each area. Consider what you can do in training, orientation, field practice, other training, or through on-the-job activities.

Areas to Develop	How I Can Build My Skills in This Area

Action Ideas: Other things I'd like to do following this training:



Assignment: Communications

Directions:

1. Complete the communications self assessment on the following page.
2. Total your scores.
3. Read the two pages following the self assessment *after* you complete the self assessment.



Assignment: Communications Self-Assessment

Directions: On each line read the four choices, and select (by placing a check mark) the work or phrase that is most descriptive of you. Remember to check only one choice per line.

- | | | | |
|---|---|--|--|
| 1. ☐ Like to analyze | ☐ Like to interact | ☐ Like to decide | ☐ Like to explore |
| 2. ☐ Objective | ☐ Emotional | ☐ Practical | ☐ Visionary |
| 3. ☐ Logical | ☐ Encouraging | ☐ To the point | ☐ Creative |
| 4. ☐ Consistency | ☐ Spontaneity | ☐ Determination | ☐ Insight |
| 5. ☐ Order | ☐ Cooperation | ☐ Results | ☐ Concepts |
| 6. ☐ Value details | ☐ Bored with details | ☐ Value facts | ☐ Value ideas |
| 7. ☐ Controlled | ☐ Personable | ☐ Action oriented | ☐ Dreamer |
| 8. ☐ Composed | ☐ Empathetic | ☐ Quick | ☐ Intellectual |
| 9. ☐ Cautious | ☐ Informal | ☐ Sensible | ☐ Original |
| 10. ☐ Formal | ☐ Informal | ☐ Motivating | ☐ Inspiring |
| 11. ☐ Detached | ☐ Sentimental | ☐ Impatient | ☐ Preoccupied |
| 12. ☐ Problem solver | ☐ Supporter | ☐ Implementer | ☐ Developer |
| 13. ☐ Data | ☐ Feelings | ☐ Plain talk | ☐ Possibilities |
| 14. ☐ Critical | ☐ Moody | ☐ Driven | ☐ Distant |
| 15. ☐ Truth | ☐ Harmony | ☐ Reality | ☐ Change |
| 16. ☐ Precise | ☐ Tactful | ☐ Direct | ☐ Complex |
| 17. ☐ Value accurate time tables | ☐ Value past events | ☐ Value present actions | ☐ Value future achievements |
| ___ Total | ___ Total | ___ Total | ___ Total |

Source: *Team Building for Supervisors*. Georgia Academy, 1999.



Characteristics of the Four Styles of Communication

Directions: Look at your scores on the previous page. See which column you scored highest in to identify your dominant style. Find that style on this page or the next page and think about the positives and negatives. Do they describe you?

Then, brainstorm ideas for things you can do as a supervisor to meet the needs of your workers who have different styles from your own. Write your notes at the bottom of the next page.

Thinkers (Column 1)	
Positives	Negatives
➤ Are good at putting things in order ➤ Have a talent for analyzing a problem or situation ➤ Make objective decisions based on logic ➤ Tend to be brief and businesslike ➤ Value accuracy and preciseness ➤ Treat people fairly ➤ Follow policies and rules ➤ Are sought for problem solving abilities	➤ Can be overly cautious or too slow ➤ Might miss the forest for the trees ➤ Can hurt other's feelings ➤ Might not give enough positive feedback ➤ Their knack for remembering policy, adhering to policy, and attention to detail can cause a feeler to think the Thinker Supervisor is looking for things to criticize. ➤ Can come across as a "know-it-all"

Feelers (Column 2)	
Positives	Negatives
➤ Are good at building rapport and communicating tactfully ➤ Consider the impact on other people when making decisions ➤ Have a talent for empathizing and creating harmony ➤ Are naturally friendly and have a good sense of humor ➤ Take an interest in the person behind the job ➤ Treat each person uniquely	➤ Overly personalize situations ➤ Relationships can cloud judgment ➤ Might overlook important details ➤ Lack of planning can cause disorganization ➤ May spend too much time socializing ➤ Ask a feeler "how are you?" and they will tell you more than you will ever want to know ➤ Empathy for client can cause stress



Sensors (Column 3)	
Positives	Negatives
➤ Are resourceful, determined, practical and down-to-earth ➤ Have a talent for getting things done ➤ Make decisions quickly based on facts and past experience ➤ Focus on actions, results and rewards ➤ Like to get to the "bottom line" or "cut to the chase" ➤ Enjoy the present moment ➤ Work steadily with a realistic idea of how long it will take	➤ Impulsive ➤ Competitive ➤ Aggressive ➤ Impatient ➤ Disregard long-term consequences of actions/decisions ➤ Under stress may alienate workers ➤ May be poor listeners often interrupt ➤ Might create "messes" for others to "clean up"

Intuitors (Column 4)	
Positives	Negatives
➤ Are visionary, seem to see into the future and are good long range planners ➤ Love to learn new skills ➤ Have great imaginations ➤ Focus on how things can be improved ➤ Are able to identify creative solutions and fresh and novel approaches	➤ "Absent-minded," scattered ➤ Long on vision, short on action ➤ Avoid nitty-gritty ➤ Hard to read ➤ May come across as "superior," arrogant, or condescending ➤ May not follow-through on tasks ➤ May procrastinate

Source: *Team Building for Supervisors*. Georgia Academy, 1999.

Things I can do as a supervisor to meet the needs of my workers who have different styles from my own:



Worksheet: Adapting Your Style of Communication

Directions: Brainstorm ideas for things you can do to meet the needs of your workers who have different styles from your own. Use the appropriate table below or on the next page. A spokesperson from each group should be prepared to post and present the group's ideas.

Group One: Supervisors who are *Thinkers*

How can you adapt your style to connect more effectively with workers who are:

Feelers:

Sensors:

Intuitors:

Group Two: Supervisors who are *Feelers*

How can you adapt your style to connect more effectively with workers who are:

Thinkers:

Sensors:

Intuitors:



Group Three: Supervisors who are *Sensors*

How can you adapt your style to connect more effectively with workers who are:

Feelers:

Thinkers:

Intuitors:

Group Four: Supervisors who are *Intuitors*

How can you adapt your style to connect more effectively with workers who are:

Thinkers:

Sensors:

Feelers:

Source: *Team Building for Supervisors*. Georgia Academy, 1999.

Individual conference with your supervisor:



Worksheet: Individual Conference with Your Supervisor

Your supervisor is a “foundational guide” for you as a supervisor. Since you serve as a bridge between your supervisor and your unit, it is important to make sure that you are very clear about your supervisor’s expectations regarding what, how, when, to whom, and why information is communicated. Each supervisor has a different style; some want to be informed about details, while others prefer a high-level overview. Some are very open; others hold their cards close to their vests. It is your responsibility as a new supervisor to have a frank discussion with your supervisor about his/her expectations. The first step is talk with your supervisor and find out what types of information he/she wants and doesn’t want and what information should/shouldn’t be shared with staff. The list below contains possible talking points for you and your supervisor.

- Personnel issues
- Recognition of outstanding work
- Potentially problematic cases (e-mail summary preferred, or a phone call?)
- Your own professional development needs
- Getting feedback on your performance and that of your unit
- The types of data the supervisor wants on a regular basis

Once you and your supervisor have a shared understanding of what information is generally to be communicated, and how, you should schedule regular times for:

- Talking about your PMF
- Asking for constructive feedback (What can I do differently?)
- Checking about priorities for your own work (when your calendar is full)

If you are unsure about what items and issues to bring to your supervisor’s attention, another resource you have is other supervisors. They are more familiar with the supervisor’s style and preferences than you are as a new supervisor, and they can advise you.

In the space below, jot down some things you’d like to discuss with your supervisor regarding communications.



Monthly Conferences

Purpose: Monthly worker conferences are valuable tools in enhancing worker performance. Conferences can be used to explain or review policy, pinpoint individual areas of need, plan methods for improving performance, and reinforce areas of commendable performance. Worker conferences allow the supervisor to focus specifically on the performance of the individual worker. It is very important to have a set, predictable structure to these meetings.

Agenda At least monthly, all these items should be discussed:

- Individual's PMF (go over each section)
- Use one-sheet review forms (see if the county may have a standard sheet)
- Ask what the person needs from you in order to do well.
- Use strengths to reduce problems.
- Be prepared; know what you are going to say
- Get updates on cases (Services)
- Address trends (OFI)
- Permit no interruptions. Show respect for this time.

Control the tone of the meeting:

- Focus on performance and behavior rather than personality or attitude.
- Identify methods to improve performance.
- Give worker an opportunity for input and venting.
- Document the conference. Have worker sign or initial conference notes. Place notes in performance diary.
- Prohibit interruptions as much as possible.
- Be on time and expect the worker to be equally as punctual.
- Limit time of conference.
- Be prepared to deal with "personal problems" and other individual worker problems.
- Don't take comments personally.
- Be aware of your own attitudes and emotions—what biases do you bring to the table?
- Provide known facts about rumors and admit what you don't know. Be positive.

Follow up:

- Document all data (signatures)
- Follow up on action items



Unit Meetings

Effective leaders make an enormous difference in the productivity of the group. When leaders are well prepared and conduct crisp meetings, they convey to participants that they accept responsibility for the outcomes of the meetings. They care about the time of everyone involved. They want to produce the best outcomes with a minimum investment. **Note:** You are expected to hold regular unit meetings no less often than once a month; never say that you have nothing to say or no reason to meet. Generally, you should plan for 1½ to 2 hours per meeting.

Reasons for unit meetings:

- Information sharing
- Staff retention
- Translate the mission/vision
- Recognize individual, team, and agency achievements.
- Celebrate successes and share with other team members.

Create an agenda:

- Keep a tickler file and add these items; get input from others on the team.
- Send a copy to your supervisor.
- Include an activity or discussion around team building or values.
- Plan a motivational ending with a challenge to be completed before the next meeting.
- Provide a structured forum for staff to express their concerns.
- Occasionally invite speakers from partner agencies and other organizations.
- Have the meatiest items in the middle; start and end with more cut-and-dried items.

Suggested Agenda:

- Present agenda.
- Examine and probe brief, relevant meeting minutes from prior meeting.
- Make informational announcements.
 - Include information from supervisory meetings, including activities in the agency.
 - Address policy and procedure changes.
- Vote to include special items on agenda.
- Work on less controversial, easier items:
 - Include an activity or discussion around team building or values.
 - Occasionally invite speakers from partner agencies and other organizations.
- Work on difficult items.
- Break
- Work on "for discussion only" items.
- Consider special agenda items as time permits.



- Work on least difficult items.
- Summarize and adjourn.
 - Plan a motivational ending activity with a challenge to be completed prior to the next meeting.

Before the meeting:

- Reserve a room; don't try to cram everyone into your office.
- Give staff adequate notice on the time and place for the meeting.
- Send policy information in advance.
- Ask for input on agenda.
- Ask various staff to take leadership on certain agenda items, such as explanation of policy.
- Get to know the preferences and needs of different people and try to address them.
- Put things on the agenda that are going to benefit the group.
- Be careful about taking individual issues and generalizing it to a whole-group problem. (e.g., just because someone is late, we don't need a new tardiness policy)

Managing group dynamics:

- Go over the agenda and make sure everyone is clear on what needs to be accomplished and what their roles are.
- Get everyone to participate and to have an ownership role in the success of the unit.
- Explain rationale for decisions.
- Show respect for experience, but maintain your own authority.
- Vary location times and locations (e.g., an occasional breakfast meeting or picnic lunch).
- Control the agenda. If you don't have the right information, documents, or people to make a decision, table it for follow up. If the pace is lagging, summarize and ask for agreement.
- Observe, listen, and ask questions, rather than doing all the talking yourself.
- Encourage diverse views, and encourage each person to contribute.
- Cut down on "rumor mill" by honestly addressing what is known/not known about upcoming changes.
- Delegate the taking of minutes to someone besides the meeting facilitator.
- Rotate facilitation of meetings as appropriate.
- Nail down decisions and follow-up steps.

Follow up:

- Send out meeting minutes and "to do" items.
- Follow up on motivational piece and any other assignments.
- Occasionally discuss how to make meetings more productive.



Roles People Play in Meetings

The supervisor, as meeting facilitator, must be sensitive to the needs and feelings of the participants and flexible enough to adapt his style to meet each situation that arises. The supervisor should have the ability to encourage each participant to assume roles that will help, rather than hinder, the group in coming to a decision or reaching its goal.

Group Blocking Roles		
Role	Characteristics	Facilitation Strategies
Aggressor	Criticizes and deflates status of others; disagrees aggressively	
Blocker	Stubbornly disagrees; rejects other's views, cites unrelated personal experiences, returns to topics already resolved	
Withdrawer	Won't participant; converses privately, self-appointed note taker	
Recognition seeker	Boasts, talks too much, conscious of status	
Topic jumper	Continually changes subject	
Dominator	Tries to take over, asserts authority, manipulates the group	
Special interest pleader	Uses group's time for issues only of interest to him/her	
Show off	Wastes group's time showing off, telling stories and jokes, being nonchalant or cynical	
Self-confessor	Brings up irrelevant stories of his or her own feelings or insights	
Devil's advocate	Always makes an opposing argument, regardless of his/her actual thoughts and feelings	



Group Building Roles		
Role	Characteristics	Facilitation Strategies
Initiator	Suggests new or different ideas for discussion and approaches to problems	
Opinion giver	States pertinent beliefs about discussion and other's suggestions	
Elaborator	Builds on suggestions of others	
Clarifier	Gives relevant examples, offers rationales, proves for meaning and understanding, restates problem	
Tester	Raises questions to "test out" whether group is ready to come up with a decision	
Summarizer	Reviews discussion, pulls everything together	

Group Maintenance Roles		
Role	Characteristics	Facilitation Strategies
Tension reliever	Uses humor or calls for break at appropriate times to draw off negative feelings	
Compromiser	Willing to yield when necessary for progress	
Harmonizer	Mediates difference, reconciles points of view	
Encourager	Praises and supports others, friendly, encouraging	
Gate keeper	Keeps communications open, encourages participation	



In Box Activity: Selecting a Method

Overview:

- In the next in box activity, you will work in small groups. Each small group will be assigned one of the three parties on the slide.
- Your group will look through the in-box items and identify what the supervisor needs to communicate to that party and the best method to use.

Preparation:

- Form small groups of about four or five. At least three of each group's members must have different styles.
- Per your trainer, write down your assignment here:

In Box (OFI or Services) _____

Party _____

Directions: Look through the In Box items and identify what the supervisor needs to communicate to the party you listed above and the best method to use. You may use a meeting, phone call, one-on-one discussion, email, letter, etc. You should list out key points you want to include in your communication, and you may want to include others in your communication.

Use the worksheet on the next page to organize your work.

When you have finished with the work above, create a poster that summarizes your work. The poster may take any form that communicates your work.



Worksheet: Selecting a Method

In Box Item	Method	Key Messages	Others to Include	Additional Notes



Communications Skills Practice: “Taboo” and “Do” Skits

Preparation

Create two teams, one for the “taboo” and one for the “do.” Each team should select:

- One or more directors to guide the action
- Cast members/writers. They will star in the skit and help with scriptwriting
- A producer to make sure the team stays on track and on time

Stage 1 The Directors facilitate brainstorming the list of Taboos and Do's for their skit. 5 minutes

- *For example, if you are scripting for a skit on unit meetings, the taboos will feature 4-5 examples of bad unit meeting practices. The dos will show the same unit meeting with the supervisor thriving and efficiently dealing with the situations.*

Stage 2 - Start writing your two skits—one for “taboos” and one for “dos.”

- Each skit should last no longer than 8 minutes (so it will only represent a portion of the meeting). ***This is a strict time limit!*** Both skits should be **realistic**. 15 minutes

Stage 3 The directors should meet with their teams, and each team should have formed an idea for a skit. Review this main theme and discuss the concept with each team. 5 minutes

- Directors should make sure that there are some parallels between the “do” and “taboo.”

Stage 4 Practice your skit. Make sure everyone knows their roles. 5 minutes



The Coaching Model

Observe, Listen, Diagnose

The result of your observation is to determine whether you have an acceptable performance, an outstanding performance, or a gap between what is happening and what is expected.

What to observe:

- Behavior (objective, measurable)
- "What a video camera would show"
- Behavior that has a direct impact on important unit goals (not inconsequential personal behaviors that don't affect the productivity of the unit)

How to observe:

- Direct observation
- Direction questioning
- Reading written records (such as cases and reports)
- Third-party feedback (always check this)

What to listen for:

- The case manager's understanding of the situation (listening builds trust and rapport and you can find out the person's perceptions of both facts, feelings, and thoughts)
- Clues about the situation that aren't obvious to the case manager (such as another side to a story)

How to diagnose:

- Compare actual behavior to an expected competence or performance standard.
- Determine the root cause of the situation.
- Determine if you are observing a symptom or the cause.
- Determine what, how much, and how important.
- Remember that it is just as essential to identify the root cause of *successes* as it is for gaps.
- Make sure you have all the information before you act/don't act.



Give Feedback

- Motivational feedback → To encourage
 - *You really did a good job of listening to that customer and defusing her anger.*
- Developmental feedback → to improve performance.
 - *You wrote "client has a bad attitude" in your case record. Next time, try including specific details about what you saw and heard so that the notes are more descriptive. This would really help the whole unit.*
- Evaluative feedback → To let the person know if performance meets expectations
 - *We are aiming to get all this information for the report by tomorrow. You are about half done. I know you're working hard on other things, and I'm concerned about your progress.*

Characteristics of good feedback:

- Private
- Descriptive (of what happened)
- Specific
- Clear
- Timely

Steps in giving effective feedback:

- Open
- Clarify
- Develop alternatives
- Agree
- Close

Determine Next Steps

Steps for recognizing good performance:

- Specific thank you or good job
- Teach or share the skill
- Apply the skill in a new situation (when you want to leverage the behavior by having the person train others or apply the skill to new situations)

Steps for closing performance gaps:

- Action plan for improvements
- Focused training for specific skills
- Observe and analyze self and others
- Build on strengths

Other possibilities:

- Ignore, when behavior is acceptable but commonplace or when behavior is not important (careful: Ignoring can also send the message that you think the *person* is not important).



Follow Up

Purpose of follow up:

- Close the loop on development activities
- Reinforce that the behavior is important
- Provide additional or different developmental support
- Provide employee with clear appraisal of their development

Guidelines for following up:

- Negotiate consequences with staff person; that is, discuss ahead of time what might be appropriate consequences for positive/negative behaviors.
- Find out what is important to them.
- Make a personal commitment to follow up immediately.
- Make a personal commitment to be consistent in following up even if it seems to take a lot of time.

How to follow up:

- Monthly conferences
- Letters, emails, voice mails, phone conversations
- Summary reports
- Presentations to other staff on new techniques or learning

PIC: Personal, Immediate, Certain:

- Personal follow up is individualized, appropriate and meaningful for that employee
- Immediate follow up is more effective than delayed follow up.
- Certain consequences mean that the employee knows his/her behavior will be noticed—for better or for worse. It also promotes an atmosphere in which the supervisor is perceived as fair.



Case Story: Carl, Maria, and Maria's Team

Analysis Questions

- *What was the situation Carl addressed?*
- *What were the steps Carl took as he coached Maria?*
- *How important was the issue? Why?*
- *How did Carl give feedback to Maria?*
- *What was the response to the situation?*
- *How will Carl follow up with Maria?*
- *Speculate about the outcomes if Carl had missed the chance to coach Maria.*
- *What was the situation Maria addressed?*
- *What were the steps Maria took as she coached her team?*
- *How did Maria give feedback to the team?*
- *What was the response to the situation?*
- *How will Maria follow up with the team?*
- *Speculate about the outcomes if Maria had missed the chance to coach the team.*

Maria is the supervisor of an ongoing and intake unit at the Perfection County DFCS. Her unit has nine members, including Maria, a lead worker and 9 case managers. The unit is supported by the Field Program Specialists, OIT Specialists and State Office Personnel as well as county and regional management. Maria reports to Carl, the Program Director.

Upper Administration has empowered all teams in the agency to monitor their own processes, identify the areas where they need improvement, and develop their own plans to address these areas of improvement in a timely and accurate manner. Progress reports are due to management on a regular basis.

One afternoon, Carl arrived early to speak with Maria on another subject and walked in on one of the unit meetings in which members were addressing their areas of improvement. After Carl was welcomed into the meeting, both Carl and Maria noticed the beginnings of a breakdown in the group discussion. Case managers from Ongoing tended to blame overdue cases and inaccurate documentation on intake. The Intake personnel tended to talk only to one another and allowed their conversation to drift off in a different direction. A couple of team members failed to participate at all in the discussion of improvements.

Maria intervened. She asked all team members to take a moment to notice what was happening in their group process. Several team members reluctantly admitted they were either off task or failing to take personal accountability to address the situation at hand. Maria

asked them to consider the goal of the meeting, the ultimate results they sought and how they could get back on task to achieve those results.

Team members took a moment to discuss Maria's request and made a succinct list of points they all agreed they needed to resolve as a group. She verbally praised them for the willingness and ability to identify and address the weaknesses in their one group process.



Finally, Maria asked the team to brainstorm and document some key group process guidelines they all agreed to follow in future unit meetings. One team member volunteered to gather the comments, write them up, and present them at the following unit meeting for a final vote. Maria stated she would expect everyone to follow the guidelines they agreed upon and then be accountable to self-monitor future team meetings according to the guidelines.

After the meeting, Carl praised Maria for the way she handled the situation. He asked Maria to recount the steps she took to coach her team. Maria reviewed her own coaching method:

- She called attention to the breakdown of group process as soon as she saw clear signs.
- She challenged the team members to identify the group process problems that were occurring and praised them when they succeeded.
- She gave the team accountability to take action to prevent future mistakes of a similar nature.
- She set clear expectations about follow up.

Carl praised Maria's actions and asked her to send him a copy of the final version of the team's group process guidelines.



Assignment: Coaching

Directions, Part One: Read the information on stages of worker development, on the following two pages. In the space below, jot down some notes about connections between what you've learned so far in training and stages of worker development.

Directions, Part Two: Think of a coaching situation. In the space below, describe the situation. The performance may meet, exceed, or not meet expectations. It may be something new or a long-term performance.



Stages of Case Manager Development

High Anxiety			
Worker feelings/ experiences	Process/Tasks to Complete Stage	Coaching Implications	Developmental Potholes
➤ Confusion ➤ Discomfort ➤ Fear of failure ➤ Low confidence ➤ Overwhelmed ➤ Enthusiasm ➤ Excitement ➤ Challenge ➤ Openness ➤ Willing to learn ➤ Moving/growing	Learn: ➤ Role ➤ Agency ➤ Unit responsibilities ➤ Specific job tasks ➤ Client population and needs ➤ Community	➤ More clearly detailed expectations ➤ Accept and meet dependency needs ➤ Provide factual tools ➤ Encourage expression of feelings ➤ Provide reassurance ➤ Clarify the relationship of worker actions to client response ➤ Recognize growth	➤ Worker who shows extreme dependency may be having ➤ Low ability to generalize ➤ Expressing fear of clients ➤ Not following through with specific tasks ➤ Low initiation

Engagement			
Worker feelings/ experiences	Process/Tasks to Complete Stage	Coaching Implications	Developmental Potholes
➤ Frustration ➤ Ambivalence ➤ Greater comfort, clarity and satisfaction	Learn: ➤ To use information ➤ Carry out job tasks ➤ Make decisions ➤ To engage clients and resources ➤ Basic skills ➤ Use of supervision	➤ Clear definition of extent of autonomy ➤ Encourage appropriate risk taking ➤ Support worker's attempts at problem solving ➤ Recognize growth ➤ Aid in generalization and transfer ➤ Model and demonstrate	➤ Demand premature autonomy ➤ Remain overly dependent ➤ Negative view of clients ➤ Denial of learning needs ➤ Specific skills deficits ➤ Confusion about priorities



Basic Mastery			
Worker feelings/ experiences	Process/Tasks to Complete Stage	Coaching Implications	Developmental Potholes
➤ Confidence ➤ More aware of organizational impact ➤ Begins to evaluate return on personal investment ➤ Some disillusion ➤ Challenged ➤ Committed	Learn: ➤ To work as a team member ➤ Organizational influence skills ➤ Specific skills needed for functional independence ➤ Specialized knowledge needed for practice competence Identify advanced skills	➤ Focus on increased proficiency ➤ Aid further generalization and transfer ➤ Increased emphasis on evaluative feedback ➤ Support with work group ➤ Support organizational and community relations	➤ Resist autonomy ➤ Failure to recognize further developmental needs ➤ Achieve a developmental plateau

Independence and Commitment			
Worker feelings/ experiences	Process/Tasks to Complete Stage	Coaching Implications	Developmental Potholes
➤ Strong feelings of autonomy ➤ Confidence ➤ Competence ➤ May view control as lack of supervisor confidence ➤ Disillusion with leadership ➤ Bored ➤ Abandoned ➤ Constrained ➤ Lack of control/influence ➤ Commitment or waning commitment	Learn: ➤ Advanced or specialized skills ➤ Preparation for new roles Work through: ➤ Own professional goals ➤ Long-term job needs ➤ Balance of personal and organizational needs	➤ Focus on career and professional development ➤ Regular structured feedback ➤ Continue recognizing new growth ➤ Advocate and negotiate on behalf of worker needs within the organization	➤ Decline in performance ➤ Dissatisfaction with the organization ➤ Limited job mobility ➤ Burnout



Case Story: Leann and Rick

Analysis Questions

- *What was the situation Leann addressed?*
- *What were the steps Leann took as she coached Rick?*
- *How important was the issue? Why?*
- *What was the response to the situation?*
- *How did Leann give feedback to Rick?*
- *How will Leann follow up with Rick?*
- *Speculate about the outcomes if Leann had missed the chance to coach Rick.*

Leann, the supervisor, knows how hard Rick works to help his families. Rick has been working as a case manager for eight months, and he is really getting more proficient and comfortable with his skills. Still, Leann worries that he puts too much stress on himself.

Rick has expressed statements such as the following to Leann:

- I must make the right decision, or something terrible will happen to the family.
- I should never feel bored or angry or disrespectful toward a client.
- When a customer fails to make progress, I must have done something wrong.
- I must show my supervisor that my heart is in the right place, and I am a good case manager.

Yesterday, Rick visited a particularly difficult family. He'd spent months trying to help them get back on

their feet—very disorganized lot—and when he went back yesterday they had slipped back into the same old mess, kids screaming, they hadn't learned anything—no movement at all. Just back in the same old mess and Rick lost his temper, got up, and walked out! He was overwrought and had displayed a temper to the client.

Rick went back to the office and told Leann what had happened. Leann asked him for the details, and for how he felt. He felt awful. In fact, he said that he felt so discouraged that he was thinking about taking a construction job.

Leann said, "OK, you lost your temper. That's not good. But I think you also showed how much you cared. Look, Rick, you will NOT be successful with every family. We deal with people, and people, despite our best intentions, do not always accept help or take steps to make their lives better. Rick, I have the perspective of ten years of practice, many case managers, and hundreds, if not thousands of cases. I think you have tremendous potential. Your success rate is very high. It is not 100%, and it *never can be*. The energy and passion you bring to the job helps inspire the entire unit to achieve our goals."



Rick seemed relieved, but Leann knew that he still was putting pressure on himself. She listened to him some more and then said, "Rick, I know you'll go back there and sort it out. If you'd like to talk about that, I'll listen."

Leann kept the mood light, and eventually, she and Rick were both laughing at his outburst of the previous day. Rick left the office feeling more energized, and Leann asked him to promise to follow up with her after he had seen the family again, to let her know how it went.

Adapted from Kadushin, A and D. Harkness. *Supervision in Social Work* New York: Columbia University Press. 2002. Pages 268-269.



Coaching Self Assessment

Directions: A primary way in which supervisors empower their people is by working with them one-on-one to improve skills and attitudes. Use the following instrument to assess the extent to which you presently use the vital skills of coaching.

I observe and listen, then ask questions.	Seldom	Sometimes	Almost always
I share my observations in a non-threatening manner.	Seldom	Sometimes	Almost always
I make sure I understand a situation before I make a diagnosis.	Seldom	Sometimes	Almost always
I provide motivational feedback to encourage. When performance exceeds expectations, I provide opportunities for the employee to leverage these skills for the benefit of the individual and the unit.	Seldom	Sometimes	Almost always
I provide developmental feedback to improve performance. I am not afraid to bring up potentially uncomfortable issues that are affecting the work.	Seldom	Sometimes	Almost always
I provide evaluative feedback to let the person know if performance is good enough.	Seldom	Sometimes	Almost always
The feedback I give is clear, specific, descriptive, and timely.	Seldom	Sometimes	Almost always
I involve the employee in the coaching process, asking for ideas for actions, consequences, and follow up.	Seldom	Sometimes	Almost always
My follow up includes PIC Consequences: Personal, Immediate, And Certain. Monitors the outcomes of coaching; provides additional assistance when necessary	Seldom	Sometimes	Almost always
I show employees how to accomplish tasks: when, where, how much, and to what standard the task should be done	Seldom	Sometimes	Almost always
I collaborate with employees to establish immediate and long-term goals for performance on particular tasks	Seldom	Sometimes	Almost always
I use formal and informal means to compliment and reward employees who make progress toward the accomplishment of critical tasks	Seldom	Sometimes	Almost always
I work with and encourage employees when they do not meet expectations.	Seldom	Sometimes	Almost always
I listen with empathy and without judgment when employees have personal problems; I offer appropriate emotional support.	Seldom	Sometimes	Almost always



Stress Test

Directions: Circle below those life events which you have experienced *within the last year*. Then, add up the numbers beside each of those events.

Life Event	Score	Life Event	Score
Death of spouse	100	Foreclosure of mortgage or loan	31
Divorce	73	Change in responsibilities at work	29
Marital separation	65	Son or daughter leaving home	29
Deployment	65	Trouble with in-laws	29
Jail term	63	Outstanding personal achievement	28
Death of family member	63	Spouse begins or stops work	26
Serious injury or illness	63	Begin or end school	26
Marriage	50	Change in living conditions	25
Fired from job	47	Change in personal habits (self or family)	24
Marital reconciliation	45	Trouble with boss	23
Reunion	45	Change in work hours or conditions	20
Retirement	45	Change in residence	20
Health change in family member	44	Change in schools	20
Pregnancy	40	Change in recreation	19
Sexual difficulties	39	Change in church activities	19
New family member	39	Change in social activities	18
Business readjustment	39	Mortgage or loan less than \$40,000	17
Change in financial state	38	Change in sleeping habits	16
Death of close friend	37	Change in number of family gatherings	15
Career change	36	Change in eating habits	15
Change in number of arguments with spouse	35	Vacation	13
Mortgage/loan over \$50,000	31	Christmas	12
		Minor violations of the law	11

Source: Holmes and Rahe, *Stressful Life Events*. 1967.

0-149	Mild life stress	30% chance of illness
150-299	moderate life stress	50% chance of illness
300+	Major life stress	80% chance of illness



Signs and Symptoms of Stress	
Intellectual symptoms: How stress can affect your mind	Emotional symptoms: How stress can make you feel
➤ Memory problems ➤ Difficulty making decisions ➤ Inability to concentrate ➤ Confusion ➤ Seeing only the negative ➤ Repetitive or racing thoughts ➤ Poor judgment ➤ Loss of objectivity ➤ Desire to escape or run away	➤ Moody and hypersensitive ➤ Restlessness and anxiety ➤ Depression ➤ Anger and resentment ➤ Easily irritated and "on edge" ➤ Sense of being overwhelmed ➤ Lack of confidence ➤ Apathy ➤ Urge to laugh or cry at inappropriate times
Physical symptoms: How stress can affect your body	Behavioral symptoms: How stress can affect your behavior
➤ Headaches ➤ Digestive problems ➤ Muscle tension and pain ➤ Sleep disturbances ➤ Fatigue ➤ Chest pain, irregular heartbeat ➤ High blood pressure ➤ Weight gain or loss ➤ Asthma or shortness of breath ➤ Skin problems ➤ Decreased sex drive	➤ Eating more or less ➤ Sleeping too much or too little ➤ Isolating yourself from others ➤ Neglecting your responsibilities ➤ Increasing alcohol and drug use ➤ Nervous habits (e.g. nail biting, pacing) ➤ Teeth grinding or jaw clenching ➤ Overdoing activities such as exercising or shopping ➤ Losing your temper ➤ Overreacting to unexpected problems



Stress Management Strategies

Engage in Healthy/Healing Activities. Engaging in activities that are good for you is essential. You are in control of how you treat yourself. The list below includes things you have heard before and inherently know, but as “helpers” we often forget.

- **Eat right.** Put down the chips and pick up an apple. Drink less caffeine and more water.
- **Exercise regularly.** Exercise is a stress reliever. Even if the only exercise you have time for is walking around the parking lot at lunch – try it. You will be amazed at how much better it makes you feel. (It also gets you out of the office, away from the computer, etc.)
- **Get enough sleep.** Your body needs sleep to recover so that you are better able to handle the stress of a new day.
- **Practice relaxation techniques.** You know them – deep breathing, visual imagery. We often help our clients find ways to relax. Believe it or not, they'll work for you too!
- **Spend time with friends.** Being with people you like and who care about and respect you is a great stress reliever. Allow yourself to enjoy the company of others instead of focusing only on work and work issues.

Below, please find a few of the possible, positive ways you can address stress. Jot down the things you do (or will begin making a point to do) in order to better care for yourself. List additional items within each column.

Physical	Psychological	Emotional	Workplace
Sleep well Eat well Exercise Walk/Jog Dance	Self-reflect Read for pleasure Say "No!" Smile Solitude	See friends Cry Laugh Praise yourself Meditate	Take breaks Set limits Get peer support Get supervision Use vacations

It will also be useful to think about some of the less-than-healthy ways that you or others typically attempt to combat stress. It's much easier to give up a bad habit if you replace it with something -- just make sure it isn't another bad habit! Make a conscious effort to put yourself first and replace any unhealthy coping methods you may be relying on with more positive, healthy strategies.



Reflection: Case Manager and Supervisory Stress

Alfred Kadushin writes, "The supervisor is responsible for helping the supervisees adjust to job-related stress." The following summarizes what Kadushin identifies as the causes of stress for case managers. If supervisors are aware of the causes of stress for their staff, they can better help staff cope. This is the key to **Supportive Supervision**. Note that items in quotes are from Kadushin.

1. Administrative supervision gives staff support by giving well-defined structure, clear definitions, and defined expectations. Yet, this source of support can cause stress. **All those helpful rules, well, they can get quite "bureaucratic."**
2. Kadushin writes, "...educational supervision is a source of both tension and support. **Education implies change** and the target of change efforts is the worker. Change involves, of necessity, a temporary disequilibrium, an 'unfreezing' of the old equilibrium. Educational efforts, then, inevitably induce some anxiety."
3. The Supervisor-supervisee relationship can cause stress. Case managers want to be **watched over**; that is, "kept" from making serious mistakes. Can a case manager be watched over without being "watched?" Is this, in part, what Commissioner Walker may mean by "no one works well unsupervised"?
4. "The supervisor-supervisee relationship evokes the parent-child relationship and, as such, may reactivate anxiety associated with this earlier relationship. **If the supervisor is a potential parent surrogate**, fellow supervisees are potential siblings competing for the affectionate responses of the parent. The situation therefore also threatens to reactivate residual difficulties in the sibling-sibling relationship. It is a particularly fertile context for the development of transference."
5. "There may be tension that results from the supervisor's legitimate need to discuss some of the emotional responses of the worker to the case situation."
6. "Some conflict between worker and supervisor results inevitably from **differences in perspective**. The worker faces the client directly. The client is in a position to punish the worker with hostility, contempt, rejection, and apathy or reward by changes in behavior, by praise, and by appreciation. The worker is concerned with client needs for these reasons as well as in response to a desire to be helpful. The supervisor is not exposed to client reaction but is directly exposed to administrative reaction, from which the worker is buffered. The supervisor's concern is to see that agency administration is pleased with his/her work. Given their different positions in the agency hierarchy, the worker and supervisor have different



perceptions of their world. The worker tends to see the case, the supervisor to see the caseload."

7. "Workers **deal with people who live under considerable stress**. They encounter the clients at a time of crisis, when their emotional reactions are overt and strong"... Case managers are taught to be empathetic. A case manager "must feel some of the pain, the anguish, the despair, the hurt that many of the clients feel."
8. "Workers encounter '**clients**' who have neither asked for nor want agency service and who are **hostile and resistant** to their efforts to help. And the caseload includes groups of clients whose behavior is offensive to many workers—child molesters, wife beaters, rapists, child abusers."
9. "There is the stress associated with being on the receiving end of bitter **complaints** about the worker's supposed inadequacies and failures, of insults and verbal derogation."
10. "Caseworkers are stressed by **having to decide between the competing needs** of different clients. Devoting a considerable amount of time to one client means neglecting another."
11. Caseworkers are told to "be objective and maintain some **emotional distance** from the client, but at the same time, he/she is required to be **empathetic**, feeling what the client feels."
12. Caseworkers are asked "to accept the client as he is and is expected to help him to change because what he is not acceptable."
13. "There is the stress **associated with the opposing pressures** of being a professional in a worker-client relationship, on the one hand, and our humanistic tradition on the other. The professional relationship implies inequality in knowledge and power in our favor; the humanistic tradition strives for equality and collegueship in the relationship... We are the helpers; they are the ones needing help. But this inequality offends us..."
14. "...the work social workers do does not confirm itself. There are **no observable, objective, tangible indications** of whether our interventions have been successful... Social workers are not often rewarded by unmistakable indications that their interventions have made a difference... Since the work is done in private, workers do not get the confirmation of their competence from other professionals who, having witnessed the performance, might commend the worker. The doctor in the operating room, the lawyer in the courtroom might be congratulated by peers who have observed the competent professional in action... The performance of actors, athletes, and musicians are applauded by their clients, the audience. Applause is an overt, instant expression of approval. In contrast, workers rarely get direct confirmation of their competence by applause from their clients."



15. As clergy “are expected to lead more morally perfect lives than the population at large, the title **Social Work Professional** leads to expectations that the person so identified would be to better adjusted, be more successful in interpersonal relationships, be better parents, and have better marriages than others.”
16. “When asked how often **rules are changed**, a Detroit caseworker answered, ‘Every time you put your pencil down. As soon as you make a change, a change has been made on what you just changed.’ An Atlanta caseworker agreed: ‘We get so many manual transmittals with so many changes that it’s impossible to stay on top of everything.’”
17. There is the stress of **doing better and doing more**—trying to balance quality and quantity.
18. Low **salary** is a cause of stress in a society that “often perceives salary as an objective measure of one’s worth to society.”
19. “There is stress that derives from the necessity of **working cooperatively** with other institutions in society that are based on values somewhat at variance with the values to which the social worker owes allegiance. The worker often has to work with the legal system, with the educational system, and the health system, which see the problems of his/her clients from different vantage points. The worker faces the stress of communicating in different universes of discourse and accommodating different points of view regarding the same problematic situation.”
20. There is the stress of **heavy workloads**, sometimes driven hard by turnover.
21. There is stress due to the fact that **social work is about life**. “Life” and “work” become difficult to separate when your “work” is “life”.

Adapted from, Kadushin, A and D. Harkness. *Supervision in Social Work*. New York: Columbia University Press. 2002.



Stress Management Strategies

Directions: For the items assigned to you, identify strategies that you can use as a supervisor to help case managers

Item	What I Can Do To Help Reduce or Manage Case Manager Stress	What I Can Do To Help Reduce or Manage My Own Stress



Top 10 Traits of a Good Coach and Communicator



Emergencies We Can Anticipate

Situation	What Can We Do Ahead of Time to Minimize the Effects of This Situation	My Notes



Situation	What Can We Do Ahead of Time to Minimize the Effects of This Situation	My Notes



Benefits of Managing Work and Delegating Effectively

Directions: Read each of the statements below and identify how important it is to you.

More work can be accomplished and deadlines can be met more easily when everyone is aware of goals and their role in accomplishing them.	Not important	Somewhat important	Critical
Employees become involved and committed when there is a clear plan they understand.	Not important	Somewhat important	Critical
Crisis situations can be much less disruptive when a plan is in place to deal with them.	Not important	Somewhat important	Critical
The assignment of specific responsibility and authority makes control less difficult.	Not important	Somewhat important	Critical
Employees grow and develop when they are delegated tasks that stretch them.	Not important	Somewhat important	Critical
Human resources are utilized more fully and productivity improves when the right people are assigned to the right tasks.	Not important	Somewhat important	Critical
Individual performance can be measured more accurately when there is clarity around assignments.	Not important	Somewhat important	Critical
A diversity of tasks and people can be managed effectively when planning and delegation are thoughtful and systematic.	Not important	Somewhat important	Critical
Employee satisfaction and recognition are enhanced when they are delegated tasks that provide opportunities for growth and recognition.	Not important	Somewhat important	Critical
The supervisor has time for planning, organizing, motivating, and controlling when appropriate tasks are delegated.	Not important	Somewhat important	Critical
Potential crises become much less disruptive when there is a plan in place to deal with them.	Not important	Somewhat important	Critical

The biggest benefit I hope to realize through planning and delegation is...



Establishing a Vision and Goals

Directions: The steps below are for you to follow back on the job. You should discuss your findings and progress with your Field Practice mentor.

1. Talk to lots of people inside your organization. Ask them why they think the organization exists. What is its purpose to society? What distinguishes it from other organizations? Why should people work hard to make it succeed? Where could it go? What could it do for society? Where will the organization be five years from now? Where should it be? What kind of culture should you be seeking to create?
2. Once you discover what others think about those questions, you can add your own ideas and beliefs and fine-tune your vision for your unit.
3. As a team, create a vision statement for your unit. Make sure it supports our shared mission, vision, and values.
4. Articulate the vision. Get it written down with the help of those around you. Use the most action-packed language possible.
5. Make certain that the vision statement is clear to everyone in the unit. All terms should be clear and unambiguous. The vision statement should describe what you *won't* be as well as what you will be, if there is confusion about that now.
6. Talk about the vision frequently. Refer back to it as the compass by which all important decisions are made. Let everyone know that the vision statement is a serious document that you will use as you make decisions. Never get bored giving the stump speech on the vision.
7. Make the vision statement a living set of ideas. People must know that you and others in leadership roles will work hard to make it real. It must serve as a bridge from the reality of today to the possibilities of tomorrow.
8. Remove every distraction, every barrier to you unit's achieving that vision. Ask your staff to identify those distractions and barriers.

From Zenger, John H. *22 Management Secrets to Achieve More With Less*. New York: McGraw-Hill. 1997. Pages 27 and 28.



Reflection: My Thoughts on a Vision for the Unit

Key elements I think should be included in our vision:

Steps I will take to establish a vision for my unit:



Creating Structures for the Unit

Directions: Think about some structures you might want to think about setting up for your unit, based on successes that you and others have had. Make notes below that you can use on the job.



Top Seven Tips for Presenting Expectations



What to Delegate

You <i>must</i> do	➤ Personnel issues ➤ Strategic decision making
You <i>should</i> do, but someone could help you;	➤ Reports, special requests (if skill level is there) ➤ Signing off on time sheets (if this responsibility has been officially designated to a lead worker) ➤ Projects with a short turn around time
You <i>could</i> do but others could do it if given the opportunity	➤ Representing unit at meetings ➤ Facilitating part of a unit meeting (e.g., policy) ➤ Reviewing time sheets ➤ Functions you dislike (try to find someone who likes them)—this is not the same as giving people the “dirty work”
Others <i>should</i> do, but you can help in an emergency	➤ Routine decision making ➤ Tasks that others are more qualified for than you are ➤ Work that builds employee skills and value
Others <i>must</i> do	➤ Assignments that add variety to routine work ➤ Tasks that will increase the number of people who can perform critical assignments

Note: There are also cases when you should “delegate up.” This means taking the task to your supervisor and asking for further guidance or assistance. These include:

- High visibility situations
- Media requests



In Box Exercise: What to Delegate

You <i>must</i> do	
You <i>should</i> do, but someone could help you;	
You <i>could</i> do but others could do it if given the opportunity	
Others <i>should</i> do, but you can help in an emergency	
Others <i>must</i> do	



Five Steps to Successful Delegation

Step One: Planning	
1. Analyze your tasks and identify one you feel will provide you with additional freedom as well as benefiting the employee to whom you delegate it. 2. Determine goal(s). 3. Visualize results. 4. Consider needs (materials, policies, coaching, resources, etc.) 5. Determine time frame. 6. Choose the right person. Know workers' skills and capacities; tap each one's special creativity. Consider rotating tasks to keep employees motivated. Don't always give one person the "hard" stuff. 7. Decide if any others need to be involved. 8. Decide how to gain commitment. 9. Solicit input from workers by asking, "How can we manage this?"	
Step Two: Engaging	
10. Present big picture. 11. Gain commitment. 12. Communicate the goal(s). 13. Communicate the expected results. 14. Give pertinent information, such as deadlines. 15. As needed, teach the person how to perform the task. Include explanation, demonstration, and "teach back," as needed. 16. Ask for a plan of action. 17. Check for understanding and provide a chance for person to ask questions. 18. Arrange for a meeting to see how it is going.	
Step Three: Collaborating	
19. Review the goal and expected result. 20. Discuss the plan and ways to overcome any possible obstacles. 21. Communicate boundaries. 22. Discuss how/when monitoring will be done. 23. Schedule coaching sessions, if needed. 24. Establish milestone meetings.	



Step Four: Supporting	
25. Allow the employee the freedom to practice and get up to speed. 26. Check progress. Follow up in a positive manner. 27. Evaluate the need for coaching or other support. 28. Discuss obstacles and solutions. 29. Offer encouragement and support. 30. Create a relaxed and efficient environment. People make mistakes and produce less when supervision is too close and constant or too distant. 31. Be realistic and respectful of time involved.	
Step Five: Appreciating	
32. Show genuine interest in the results. 33. Give your employees every opportunity to do a good job and when they do, follow up with compliments. Give credit when credit is due. 34. Do not accept unfinished, inaccurate, or substandard work. 35. Accept your own accountability for unsatisfactory results. 36. Discuss new assignments and rotation plans with the entire group to obtain feedback and generate enthusiasm. 37. Review the delegation process to see what could have been done better. Welcome suggestions and complaints.	

Other Thoughts:

- Set a good example. Pitch in and work from time to time to demonstrate your competency, but don't overdo it.
- Don't over-identify with case manager workload stress. Acknowledge that it will be difficult at first until the system is in place.
- Consider designating certain days/times of day for "closed door" work.
- While administrative work must be done it has less impact then your work with case managers. If you take care of case managers' needs, and also tell them what you need to get done, they will also help take care of your needs. (Again, investment of time pays off.)
- Divide work equitably; delegate to all.
- Make it clear to everyone that delegating is a tool to increase unit productivity, build employee competence and confidence, and allow you more time to support them in their work.



Exercise: Five Steps to Successful Delegation

Directions: The county director has asked you to put together some numbers for a report that is due in two weeks. You have decided to delegate this task. With other members of your small group, plan a skit (no longer than five minutes) to act out your assigned step in the delegation process:

- Planning
- Engaging
- Collaborating
- Supporting
- Appreciating

Use the information on the previous two pages as a guide and a checklist.



Delegation Self Assessment

How well do you delegate? Rate each item on a 1-5 scale:

Items	Never					Always				
Each of my employees know what I expect of him/her.	1	2	3	4	5					
I involve employees in goal setting, problem solving, and productivity improvement activities.	1	2	3	4	5					
I place my personal emphasis on planning, organizing, motivating, and controlling, rather than doing tasks others could do.	1	2	3	4	5					
When assigning work, I select the case manager thoughtfully.	1	2	3	4	5					
When a problem occurs on a task I have delegated, I give the employee a reasonable chance to work it out for him/herself.	1	2	3	4	5					
When I delegate work to employees, I brief them fully on the details with which I am familiar.	1	2	3	4	5					
I see delegation a one way to help employees develop their skills, and I assign work accordingly.	1	2	3	4	5					
I support employees in emergencies, but I do not permit them to leave work for me to do.	1	2	3	4	5					
When I assign work, I stress the results desired, not how to accomplish them.	1	2	3	4	5					
When I delegate a project, I make sure everyone concerned knows who is in charge.	1	2	3	4	5					
When delegating work, I balance authority with need and experience.	1	2	3	4	5					
I hold my employees responsible for results.	1	2	3	4	5					



Time Management Tips

- 1. Don't leave email sitting in your in box.** This tip falls under the general rule of only touching each item once. All emails should be organized into folders such as "personnel issues" or "monthly report data." Once you look at an email, you should immediately think, "Is this something that requires immediate action?" If so, respond immediately, and then file it to the appropriate folder. If the message needs more thought, move it to your to-do list. If it's for reference, print it out. If it's a meeting, move it to your calendar. Take action on an email as soon as you read it.
- 2. Admit that multitasking takes away from productivity.** We know that "multitasking" is an important skill for a DFCS supervisor, but we also know that a person can only truly concentrate on one task at a time. Research shows that, regardless of age, productivity decreases when we try to do more than one thing at a time. Try to control multitasking by completing one thing before moving onto another, even if it means just completing a small part of something.
- 3. Do the most important thing first.** When you sit down to work in the morning, before you check any email, spend an hour on the most important thing on your to-do list. This is a great idea because even if you can't get the whole thing done in an hour, you'll be much more likely to go back to it once you've gotten it started. This works best if you organize the night before so when you sit down to work you already know what your most important task of the day is.
- 4. Check your email on a schedule.** It's not effective to read and answer every email as it arrives. Just because someone can contact you immediately does not mean that you have to respond to them immediately. People want a predictable response, not an immediate response. So as long as people know how long to expect an answer to take and they know how to reach you in an emergency, you can answer most types of email just a few times a day.
- 5. Keep web site addresses organized.** Use bookmarking and "favorites" lists to keep track of web sites. Instead of having random notes about places you want to check out, places you want to keep as a reference, etc., you can save them all in one place, and you can search and share your list easily.
- 6. Know when you work best.** Each person has a best time. You can discover yours by monitoring your productivity over a period of time. Then you need to manage your schedule to keep your best time free for your most important work.



7. Challenge yourself to learn one technology tip or 'trick' per month that will make computer processing and/or organizing more efficient. Do this by paying attention to GroupWise tips and IT tips as they are circulated. Here are 3 examples to get you started:

- Send Word, Excel, or PowerPoint files to others by email by sending them directly from the application. For example, if you are working in a Word document: File menu → Send to → Mail recipient (as attachment). Then, type in the person's address and SEND.
- To minimize all open applications and see your desktop, simply press START-D. (The START button is the one that looks like the Microsoft logo or a flower near your space bar.)
- To select several items at one time (to save or print): Place your cursor on one of the items, such as an attachment to an e-mail, and click on it. The item will be highlighted. While Press the CTRL button on your keyboard. Continuously hold down the CTRL button on the keyboard while you move the mouse over the different items you want to select to print or save, they will all become highlighted together as you click on them. Once you have selected all you want, let go of the Ctrl and the mouse-click and perform a right-click with the mouse. A small box will appear asking if you want to print the items or save them. Select 'print' or 'save as' as you would if you were saving or printing a single document.

8. Make it easy to get started. We don't have problems finishing projects, we have problems starting them. Try to break down projects into chunks, so you are not overwhelmed by them."

9. Organize your to-do list every day. If you don't know what you should be doing, how can you manage your time to do it? Some people like writing this list out by hand because it shows commitment to each item if you are willing to rewrite it each day until it gets done. Other people like software that can slice and dice their to-do list into manageable, relevant chunks.

10. Dare to be slow. Remember that a good time manager actually responds to some things more slowly than a bad time manager would. For example, someone who is doing the highest priority task is probably not answering incoming email while they're doing it. Obviously there are more important tasks than processing email. Intuitively, we all know this. What we need to do now is recognize that processing one's work (evaluating what's come in and how to handle it) and planning one's work are also mission-critical tasks.



Time/Value Matrix: Prioritize Your Activities

	Urgent	Not Urgent
Important	1. Do it now!	3. Gotta minute?
Not Important	2. I really should...	4. I really shouldn't...

Adapted from *Leave the Office Earlier* (Broadway Books, 2004) By The Productivity Pro®, Laura Stack, MBA, CSP

My Time Management System

Briefly describe the system that you will use to manage your time effectively. If you already have an effective time management system, write it down and consider how you can improve it.



Monthly Calendar

Consider the following: Monthly reports • Court days • Regularly-scheduled meetings • Personal commitments • Case reviews • Monthly conferences • Unit meetings • Management team meetings • Holidays • Training, including field practice • Protected time

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday



Assignment: Using Data

Directions: Look through the two data sets (either OFI or Social Services) and complete the chart. Do one data set at a time.

	What does this data seem to be telling me?	What questions do I have about this data?
Services Data Set One: Recurrence of Substantiated Child Maltreatment		
Services Data Set Two: Children Placed With Relatives		
OFI Data Set One: Medicaid (Family) Standard of Promptness		
OFI Data Set Two: TANF Work Participation Rate		



My Relationship Network Diagram

Directions: In the space below, create your own relationship diagram, using the class's Communications Network Diagram as a starting point, and substituting names for positions and relationship labels (e.g., staff, supervisor, community agency) for communication needs.



People as Resources

People as Objects. Seeing people as objects means we distance ourselves from them. We see them as something to be used, as things to be manipulated, as cases to be moved through the system, or as problems to be addressed rather than as real human beings. We do *to* them.

- An abuser might see a victim this way: "I'm going to use you or punish you, but I'm not going to consider how you feel about this because you're not really as human as I am."
- A worker might see a client this way: "This parent is just a problem to be eliminated, another case I need to dispense with as quickly as possible."
- A supervisor might see a worker this way: "This person is a cog in the wheel that can be moved over here to cover this or shifted to another unit."

People as Recipients. Another way to view people is as recipients. In that frame we see people as in need of care, we need to do things *for* them.

- A parent might tie a child's shoes for him.
- A worker might make an appointment for a client.
- A supervisor might take care of a case for a worker.

We do it for others because we believe they cannot do it for themselves. They need us. This can be a good feeling for us. It makes us feel more powerful and resourceful than those we help. It also may keep the person always dependent upon our good works. In that way, this is a more complex and challenging view to unravel.

People as Resources. The last view of people is as resources. In that frame we see people as having much of what they need already inside them. We see—and value—the things people bring to an experience. They may need help, they may need guidance, but we start by identifying and accessing their resources. The solutions we define involve and include all our resources—not just those of the designated helper.

- A parent might work to teach a child to tie his shoes.
- A worker might take the extra time to work with a client to identify and begin to access personal, family, and community resources she has available to her.
- A supervisor might ask questions of the worker guiding him toward his own solutions.

Source: Lofquist, W. A. (1991). Learning guide: The spectrum of attitudes. *Technology prevention workbook*. Tucson, AZ: AYD Publications.



The Other Side of the Desk

Have you ever thought just a little bit?
Of how it would seem to be a misfit,
And how you would feel if YOU had to sit
On the other side of the desk?

Have you looked at the man who seemed a bum,
As he sat before you, nervous-dumb
And thought of the courage it took to come
To the other side of the desk?

Have you thought to yourself, "It could be I,
If the good things in life had passed me by,
And maybe I'd bluster and maybe I'd lie,
On the other side of the desk?"

Did you make him feel that he was full of greed,
Make him ashamed of his race or creed,
Or did you reach out to him in his need,
On the other side of the desk?

May God give us wisdom and lots of it,
And much compassion and plenty of grit,
So that we may be kinder to those who sit
On the other side of the desk.

--Bonita Eberhart, LMSW



Building Relationships With Families: A Customer Service Attitude

Directions: Work in a small group. Discuss ways to involve unit in closing the gap between an ideal customer experience and the current one, including having a structure, or protocol, for customer complaints. **Focus on things you can do at the unit level.**

Actual	Ideal	Closing the Gap
Confidentiality		
Equality and access		
Customer rights		
Customer involvement		
Dignity and respect		
Choice		
Safety		
Complaint resolution		



In Box Exercise: Building Relationships

Directions: Check the issue your small group would like to address:

☐ Partner agency issue ☐ Customer complaint ☐ Unit issue from a case manager

In the space below, describe the details of the issue:

In the space below, identify what you can do to ***build the relationship*** in ways that would positively impact the identified issue.



Identifying and Exploring Red Flag Issues

Goal: To identify one high-priority performance gap (red flag) that the team would like to reduce/eliminate and investigate it to see if there are root causes that the unit can address.

Process	Facilitator Guidelines
Identify red flag issue.	➤ Present some data related to outcome measures for your unit. ➤ Make sure everyone understands the format of the data set and the content that it contains. ➤ Allow about five minutes for everyone to study the data individually, and record answers to the question, "What do these data seem to tell us?" ➤ Ask groups to share individual responses. Record on a flipchart. ➤ Allow about 10 minutes. Challenge the group to make sure that all insights are included. ➤ Ask participants to identify the one area that stands out to them as worthy of further exploration. This will be called your red flag issue. ➤ Make sure that you have consensus.(See page 83 for more information on building consensus.)
Explore the red flag issue and define it clearly.	➤ For each of the items on the flipchart, ask them to identify questions about the data; that is, "What else do we need to know?" ➤ As before, allow a few minutes for silent reflection, then ask group members to report out. Write these questions on a new flipchart. ➤ Ask participants to look through data and see if the problem statement can be refined by specifying who, when, and how the problem occurs. ➤ If you do not have the data needed to completely define the problem, put question marks on the items and assign someone to get the answers.
Identify possible causes.	➤ Individually record answers to the question, "What are some possible contributing factors related to this red flag issue?" ➤ Go around the table, asking each person to contribute a possible cause. ➤ Accept all answers without judgment or comment—you want to encourage as many responses as possible. ➤ Record /possible causes on a flipchart. ➤ Challenge the group to make sure that all insights are included.



Process	Facilitator Guidelines
Investigate possible causes.	➤ Discuss how each possible cause should be investigated, what data is needed and how the data will be found or developed. ➤ Consider all different types of data collection, including, but not limited to, interviews, observation, surveys, and document analysis. ➤ Create a plan to follow up on investigating your possible causes. ➤ Set a time for a team meeting to report findings. ➤ Based on the group's investigations, cross out possible causes that have been shown to be untrue, record new ideas for possible causes, write in areas that still need exploration, and otherwise refine the work.
Identify possible solutions.	➤ Brainstorm possible actions for case managers, supervisor, and others. ➤ Determine the solution or solutions you wish to pursue. You may find the worksheet <i>Rating Form for Prioritization</i> useful in making this decision.
Create a project work plan.	➤ Record your plan using the <i>Planning Guidelines and Template</i>.

General Tips:

- Keep the work moving forward. Do not get bogged down when you can't find information or you find avenues outside of your control.
- Do not wait for the completion of the verification process to begin its deeper investigation.
- It is important to share the work, receive feedback, and integrate feedback.
- There is value in reflection, dialogue, and capturing new ideas.



Rules for Building Consensus

Consensus is based on the term "to consent" as in "to grant permission." To arrive at consensus is to give permission to go along with the total group (the majority). The implication of consensus is that an individual can negotiate the terms by which he or she will grant his or her permission. Each individual has the right and obligation to make his or her terms known.

Consensus Means...

- ☐ All group members contribute.
- ☐ Everyone's opinions are heard and encouraged.
- ☐ Differences are viewed as helpful.
- ☐ All members share in the final decision.
- ☐ All members agree to take responsibility for implementing the final decision.

Consensus Does NOT Mean...

- ☐ A unanimous vote
- ☐ A majority vote
- ☐ The result is everyone's first choice
- ☐ Conflict or resistance will be overcome immediately

Assumptions:

- ☐ All people are choosing beings.
- ☐ All people are free to disagree and voice an opinion.
- ☐ Freedom means he/she engages in action by choice.
- ☐ Compromise is not necessary.

Commitments/Procedures

- ☐ I will explain my perception of the issue.
- ☐ I will discuss my feelings.
- ☐ I will discuss my needs/goals concerning the issue.
- ☐ I will listen and respect other opinions.
- ☐ I will grant permission to the majority, with a minority report.
- ☐ I will implement the decision.



Rating Form for Prioritization

Potential Solutions	How Severe? Rate each 1-5; 5=greatest dissatisfaction with current state	How Crucial? Rate each 1-5; 5=most important issue; needing most immediate attention	How Responsive? Rate each 1-5; 5=Easiest to change; within power of unit	Total Score Add scores from three previous columns	Individual Rankings Rank order your top five items with "5" as the top priority	Group Ranking

From Holcomb, Edie L. *Getting Excited About Data: How to Combine People, Passion, and Proof*. Newbury Park, CA: Corwin Press. 1999, pages 67-73.



Planning Guidelines and Template

Guidelines for planning:

- Maintain your focus, based on a shared, clearly defined vision of anticipated results on your red flag issue.
- Make sure all needed parties are represented in the creation of the plan.
- Make sure everyone has a shared understanding of the plan and is involved in implementing it.
- Set goals high and achievable.
- Make sure that resources are in place to support plan.
- Think about incentives and disincentives for individuals to participate in plan.
- Make sure your plan includes research into how best to implement the particular solution(s) you have chosen.
- In your plan, include goals, actions, criteria for success, indicators, when and how information will be collected, data analysis and interpretation procedures and accountabilities.

Guidelines for presenting your plan:

- Focus on explicit expectations for families, case managers, supervisor, others.
- Be honest about performance/outcome gaps and present data that can be used to hold the unit accountable for results.
- Highlight unit culture strengths.
- Make data transparent.
- Work at building a shared vision.

Template: See following pages. Make additional copies as needed.



Worksheet: Planning Guidelines and Template

Red Flag Issue:	
Goal:	

Solution:					
Criteria for success	Indicators	Data collection	Data analysis	Accountabilities	Date

Solution					
Criteria for success	Indicators	Data collection	Data analysis	Accountabilities	Date



Game Directions: Stages of Team Development

Deal the cards. Deal nine cards to two players, one card at a time (dealer does not play). Set the rest of the deck aside, face down (these cards will not be used).

Assemble Sets. Study the nine cards in your hand and arrange them into three sets of three cards each. The object of the game is to create higher-status sets. Here are the three possible types of sets arranged in descending order of status:

- **Triplet:** All three cards in this set belong to the same suit (for example, all three cards belong to the Storming stage in the team development process). A triplet is the highest-status set. It beats all other types of sets.
- **Pair:** Two of the three cards in this set belong to the same suit and the third one belongs to a different suit. Example: Two cards belong to the Performing stage of the team-development process, and the third card belongs to the Forming stage. A pair has lower status than a triplet and higher status than a diff (explained below).
- **Diff:** All three cards in this set belong to different suits. Example: One card belongs to the Norming stage of the team-development process, another card belongs to the Storming stage, and the third card belongs to Performing stage. A diff is the lowest-status set. It loses to the other two sets.

Your cards can be arranged into different types of sets. Try to maximize the status of your sets.

Reveal the first set. You select one of your sets and place it face down on the table. Your opponent does the same. Both of you now turn your sets face up. Whoever has the higher-status set scores one point for this round. ***The dealer will make a final determination*** of score by checking the Stages of Team Development Game Handout, which has the correct "suit" for each card.

Break the tie. If both you and your opponent have the same type of set, use this rule: The player with the card of the highest *value* (among any of the three cards) scores the point.

Reveal the second set. Repeat the procedure with the second set from your hand. As before, whoever has the higher-status set scores one point for this round.

Reveal the third set. Repeat the procedure with a third set from your hand. As before, you or your opponent score a point, depending on who has the higher-status set.

Determine the Winner. The player with the most points wins the game.

Play the Game Again. Switch dealers and play the game again using the same procedure.



Worksheet: Guidelines for Building Teams

Directions: Work in table teams. Use your notes and the material on page 90 to identify key ten characteristics of effective teams. Place these in the left column.

Then, discuss “indicators.” This means being very specific about “what it looks like.” For example, if *ethical behavior* is one of your characteristics, then indicators might include: “People accept responsibility for their mistakes” and “people give credit where credit is due.” Put your indicators in the middle column.

Finally, complete the final column so that you know how to take this information and apply it to your work.

Characteristic	Indicators	What a Supervisor Should Do
1.		
2.		
3.		
4.		



Characteristic	Indicators	What a Supervisor Should Do
5.		
6.		
7.		
8.		
9.		
10.		



Thought Jogger: Guidelines for Building Teams

Characteristics of effective teams:

- Shared vision and values
- Fun
- Collaborative
- Relaxed
- Purposeful
- All working toward the same goals
- Ethical
- Trusting
- Open communication
- Clear expectations
- Decision-making process that everyone understands
- Valuing of each individual
- Driven to improve quality
- Strategic
- Forgiving
- Valuing of diversity and disagreement

How to develop a team:

- Make sure everyone knows the purpose of the team and what you are trying to accomplish.
- Provide opportunities for staff to praise each other and provide recognition (e.g., in meetings on bulletin boards).
- Squash negative talk immediately. If needed, air out issues in constructive ways. Be aware of differences between a person who is situationally negative and one who is chronically negative. In either case, deal with it as a performance issue. Do not ignore it; it will not go away.
- Make fairness and consistency obvious.
- Understand the importance of appearance of favoritism.
- Show respect for experience.
- Celebrate successes.
- Have fun.
- Deal frankly and consistently, assertively and positively with behaviors that impact team morale and productivity.
- Get your own emotions under control before speaking.
- Set high expectations and hold people accountable and build self-efficiency.
- Provide team building activities. (see Thiagajaran, Sugar).
- Openly and clearly keep the vision in the forefront so that the group feels like a team that is working together toward an important, common purpose
- Use tools such as force field analysis, Nominal Group Techniques, and brainstorm to facilitate teamwork (see McEwan).
- Be a positive force who is trustworthy and who has integrity.
- Share information.



Team Communications Self Assessment

Directions: Read each of the criteria for good team communications, below. Then, identify three strengths and three areas of need.

Items		Never					Always				
Share Decision Making	All members' opinions, ideas, and knowledge are valued and considered in the decision making process.	1	2	3	4	5					
Keep Agreements	Members can rely on others to complete tasks and assignments without having to follow up or remind.	1	2	3	4	5					
Share Important Details	Members are conscientious about sharing important details to avoid misunderstandings or explain conditions which could catch others by surprise.	1	2	3	4	5					
Communicate Changes Promptly	Members promptly notify others if conditions arise that change their ability to keep commitments.	1	2	3	4	5					
Communicate Ideas for Improvement	Members offer suggestions to improve the quality of work instead of complaining and blaming other.	1	2	3	4	5					
Ask for Feedback	Members, including leaders, invite feedback. They ask for ideas and concerns, instead of waiting to see if someone will bring it up or responding defensively.	1	2	3	4	5					
Offer Feedback	Members openly and constructively expresses concerns about relationships and performance before problems arise.	1	2	3	4	5					
Actively Listen—Attending and Reflecting	Members listen attentively and demonstrate complete understanding of both the facts and feelings of what others say. Others feel that they were heard or acknowledged.	1	2	3	4	5					



Actively Listen—Questioning	Members ask insightful follow-up questions and probe for further information, exploring ideas and concerns, often uncovering important details or underlying issues.	1	2	3	4	5
Share Information Openly	Members lay all cards on the table, providing critical, sensitive, and relevant details as to needs and what they can and cannot do and why. There is not question as to where people are coming from.	1	2	3	4	5
Are Receptive to Other Points of View	Members solicit and value others' ideas and perspectives even when different from their own. Also, they are willing to admit mistakes.	1	2	3	4	5
Collaborate	Members make efforts to identify and clarify common goals and work with others toward those goals.	1	2	3	4	5
Share Credit	Members share ownership and credit for all the outcomes of the work you do together, regardless of whose idea of effort it was.	1	2	3	4	5
Care	Members display a genuine interest in the needs of other team members.	1	2	3	4	5

Three Areas of Strength

Three Areas of Need



Productivity Files

Supervisors need to develop and maintain a productivity file regarding each staff member in their unit. Productivity files house information that will enable the supervisor to write clear, objective interim (midpoint) and annual performance evaluations for every employee. Supervisors may sometimes see productivity files referred to as Performance Diaries or Supervisory Files.

Guidelines

- Information within the file needs to be maintained.
-
- Employees may review the contents of their own files at any time throughout the year.
- Productivity files need to be kept in a locked location.
- While not mandatory, it is suggested that supervisors set up each productivity file in a binder notebook with tabbed sections. If the files are organized, it will be more efficient and will save time in both maintaining the file and pulling the information together to write an employee evaluation. Suggested sections include:
 - Basic Information including core work hours
 - Orientation checklist
 - Performance Management Plan for the year including the midpoint evaluation
 - Caseload logs
 - Tear Sheets
 - Training logs
 - Case record reviews
 - Individual Conference notes
 - Commendations and complaints
 - Employee Discipline
 - Miscellaneous, including any extra non-PMP required activities, additional memos, or other information



How Do You Like Your Recognition?

Directions: Please review the following list of forms of recognition. Check the forms that you would value and like to receive. You may check as many as you like, but check only the one that appeal to you.

- ☐ 1. Receive positive verbal feedback at a staff meeting.
- ☐ 2. Asked to take on a tough problem or a new challenge.
- ☐ 3. Asked to give a presentation on your work at a staff meeting or a company conference.
- ☐ 4. Receive positive, handwritten comments in the margin of a document you prepared.
- ☐ 5. Invited to a barbecue or dinner party at the home of your boss.
- ☐ 6. Given the opportunity to work flexible hours or work at home.
- ☐ 7. Get a complimentary dinner and hotel stay with other top performers.
- ☐ 8. Given the opportunity to purchase new tools and supplies to enhance your work.
- ☐ 9. Have your picture and a story about your work appear in an internal newsletter or in the community newspaper.
- ☐ 10. Asked for your opinion on a difficult organizational problem or a new opportunity.
- ☐ 11. Given the opportunity to speak about your work at a professional conference.
- ☐ 12. Offered the opportunity to learn a new process or in other ways increase your skills and knowledge.
- ☐ 13. In a prominent location, have your picture displayed along with either a letter of commendation, a description of your work, or both.
- ☐ 14. Ask to help a colleague get started with a project or solve a particularly difficult problem.
- ☐ 15. Receive verbal recognition for your work from a senior-level executive at a company forum attended by you and your colleagues.
- ☐ 16. A solution that you recommended being implemented throughout the organization.
- ☐ 17. A customer sends a letter to your boss praising your work.
- ☐ 18. When you ask for help, your boss offers to pick up some of the load directly, share his or her expertise, or obtain outside assistance.
- ☐ 19. Receive a t-shirt or mug with your name and indication of your achievement.
- ☐ 20. Empowered to make decisions and increase control over your work.

Source: Thiagarajan, Sivasailam. *Teamwork and Teamplay*. San Francisco: Jossey-Bass. 1999.



Motivating People

With hiring and training cost rising precipitously in most companies, there has never been a better time to get the most from the employees you have. Such motivation, as we have seen, beings with a single principle: understand the individual you seek to motivate.

You may be quite surprised how inexpensive motivation can be within your organization. A supportive comment to the right person at the right time costs you little, yet may pay extraordinary dividends in terms of employee productivity and loyalty to the company. It is important to experiment freely and regularly with the motivators described here. These are powerful tools that can literally transform lackluster organizations into industry leaders.

Using scenarios, we have seen how different individuals respond to quite different motivators. Put these suggestions where they belong--at work for you!

Motivation by Need Hierarchy

1. Motivators depend directly on what an employee thinks he or she needs.
2. Those needs ca be discerned by a manager through listening and observing.
3. Employees' needs are hierarchical: lower-stage needs must be met before higher needs can be addressed.
4. The manager's needs may be quite different from the employees needs.

Motivation by Expectancy

1. Employees will devote more effort to achieving goals that they think are attainable.
2. Such effort may fall off when the achievement of the goal seems certain.
3. For maximum motivation, employees must value the rewards they expect to receive.

Motivation by Equity

1. Managers must know what jobs, titles, and salaries employees are likely to use for comparison.
2. Managers must structure organizations to prevent unproductive comparisons.
3. Managers can control information flow to influence comparison.
4. Managers can use expectancy rewards to reduce the impact of unavoidable comparisons.



Motivation by Job Satisfaction

1. Managers should beware of the Hawthorne effect, in which any group of employees highlighted for special attention will respond with temporarily increased productivity.
2. Poor work conditions can limit the capacity of workers to perform.
3. The elimination of poor work conditions does not automatically create a satisfying and motivating work climate.
4. Managers should not impose their motivational priorities on their employees.

Motivations by Management Assumptions

1. Managers should ask employees what they think about business problems.
2. Managers should encourage discussion and evaluation.
3. Managers should welcome tentative judgments and speculative ideas
4. Employees should be thanked and trusted.
5. Employees should be freed to develop individual skills for use in the company.
6. Employees should be involved in the evaluation of their work.

Motivation by Group Attitudes

1. Managers should listen to the company grapevine to determine thoughts and feeling of employees.
2. Managers should act promptly to counter false rumors and incorrect information.
3. Managers should structure their organizations to prevent disadvantageous power groups and cliques.

Motivation by Self-Perception

1. Managers should treat employees as "OK" individuals.
2. Managers should focus on actions, not personalities, when delivering evaluations
3. Managers should emphasize and plan for professional growth opportunities for employees.
4. Managers should resist scapegoating and should promote team consciousness.
5. Managers should praise and reward employees fairly.
6. Managers should be able to forgive and forget when appropriate.



Motivation by Objectives

1. Managers should take time to discuss the context and importance of work goals with employees.
2. Managers should negotiate goals for individual employee based on skills, experience, and interest.
3. Managers should tie performance evaluations directly on goals accepted by the employee.
4. Managers should distribute rewards fairly according to goal fulfillment.

Motivation by Social Transaction

1. Managers can use adult rationality and logic to persuade parent dominated employees on the value of original thinking and risk taking.
2. Managers can emphasize the appropriate expression of feeling in the work place to Adult-dominated employees who have lost the zest of work challenges.
3. Managers can influence the actions of Child-dominated employees by showing the results of their actions.

Motivation and Psychological Games

1. Managers can recognize game-players by their repetitious behavior and the presence of a no-win scenario for their interactions.
2. Managers should remove game-players from positions crucial to organizational success.
3. Managers can use attention, recognition, and understanding to motivate game-players to more productive behaviors.

Source: Smith, Dayle, M. *Motivating People..* Hauppauge, New York. Barron's Business Success Series 1997.



How to Register

Supervisors

- ♦ The **On-Line Registration & Transcript Center for SS and OFI Supervisors** is on the Internet.
- ♦ To register SS and OFI workers for courses, each worker must have an account in the system.
- ♦ Obtain the worker's Peoplesoft Employee ID from your personnel office, because you will need it to create an account for the worker. It is an eight digit number that begins with two zeros.
- ♦ Supervisors or Training Coordinators must establish all worker accounts. However, individuals previously registered through **SSRegistrar** and **OFIRegistrar** may have been added to the system already. View the List of Accounts to determine if your employee has an account. If so, begin by editing the account.

Supervisor Menu: Steps to Access the On-Line System

1. Click here: <https://www.gadfcs.org/transcript> to access the website.
2. Everyone who already had an account in the system will have a temporary password of **pass** and the last 4 digits of their employee ID number.
3. Enter your **Employee ID Number** and **Password**. Once access has been granted, a menu will appear.
4. Once you have logged in the first time, you should change your password.
5. For questions about the online registration click on the **Questions?** button in the lower far right hand corner of the screen and send an e-mail with your questions.



Account: Create a New Employee Account

1. From the **Supervisor Menu**, click on the **Accounts** button.
2. You are now in the **Accounts Menu**. From here you can click the **Create** button.
3. Fill in the fields under the **Personal Information**: **First Name**, **Middle Initial**, **Last Name**, **SSN (Option)**, **Employee ID** (Employee ID at your personnel office an 8 digit number), **Education**, **Program of Study**, **If Other** and click **Next**.
4. Fill in the blank fields for the **Contact Information** and click **Next**.
5. Fill in the blank fields for the **DFCS Information** and click **Next**.



6. Choose a **Training Coordinator** from the drop-down menu and click **Next**.
7. Click the **Create** button to create another Account.
8. Click the **Accounts** button to return to the **Account Menu**.
9. Click the **Main Menu** button to return to the **Supervisor Menu**.

Edit an Employee Account

1. From the **Supervisor Menu**, click on the **Accounts** button.
2. From the **Account Menu**, click on the **Edit** button.
3. Enter the **Employee ID** in the **Employee ID** field and click **Next**.
4. Edit the **Personal Information** section and click **Next**.
5. Edit the **Contact Information** section and click **Next**.
6. Edit the **DFCS Information Section** and click **Next**.
7. Choose a **Training Coordinator** from the drop down menu and click **Next**.
8. Click the **Create** button to create another Account.
9. Click the **Accounts** button to return to the **Account Menu**.
10. Click the **Main Menu** button to return to the **Supervisor Menu**.

Register: Register an Employee for Training

1. From the **Supervisor Menu**, click on the **Register** button.
2. Enter the **Employee ID** in the **Employee ID** field and click **Register**.
3. Choose a **Course** from the drop down menu and click **Next**.
4. Select a Section from the drop-down menu.
5. SSN is needed before completing the registration.
6. Click the **submit** button
7. Click on the **Register** button to return to the **Register Worker Menu**.
8. Click on the **Main Menu** button to return to the **Supervisor Menu**.



Certification: View Employee's Certification Information

1. From the **Supervisor Menu**, click on the **Certification** button.
2. Enter the **Employee ID** in the **Employee ID** field and click **View Cert Info**.
3. At This point, you will see the **Employee ID, Name, County, and Position**.
4. A list of certifications will appear.
5. If there are no completed certifications a message will appear
"There is no certification data in the database for this account".
6. Click on the **Certification** button to return to the **View Certification Information Menu**.
7. Click on the **Main Menu** button to return to the **Supervisor Menu**.

Transcript: View Employee Transcript

1. From the **Supervisor Menu**, click on the **Transcript** button.
2. Enter the **Employee ID** in the **Employee ID** field and click **View Transcript**.
3. At This point, you will see the **Employee ID, Name, County, Position,**
4. The Transcript will show **Upcoming Courses, Current Courses,** and the **Historical Training Records.**
5. Click on the **Return** button to return to the **Supervisor Menu**.

Remove Worker from Course

1. **You can only remove yourself from a training section that has not yet started.**
2. From the **Supervisor Menu**, click on the **Transcript** button
3. Enter the **Employee ID** in the **Employee ID** field and click **View Transcript** button.



4. Click on the **Remove** button
5. Microsoft box will appear to inform you that this is a permanent action, click the **OK** button.
6. Click on the **Return** button to return to the **Supervisor Menu**.

Search: ***Search for Employee***

1. From the **Supervisor Menu**, click on the **Search** button.
2. Add the worker's **First or Last** name in the **First or Last** name fields or **SSN** and click on the **Search** button.
3. If the worker has been registered his/her information will appear.
4. If the worker is not registered the error message will display:

"There are no employees in the database that match that search criteria."

Reports: ***Generate a Section Roster***

1. From the **Supervisor Menu**, click on the **Reports** button.
2. Click on the **Roster** button.
3. Select a **Course** from the drop-down menu.
4. Place a check in the box to view sections that have already occurred and click **Next**
5. Select a **Section** from the drop-down menu and click **Next**.
6. Click on the **+/-** next to the schools name to hide or retrieve further information about the School.
7. The **Change All** button at the bottom of the page will show all the information on all the schools.



List Accounts by Type

1. From the **Supervisor Menu**, click on the **Reports** button.
2. Click on the **Accounts List** button from the **Report Menu**.
3. The **List of Administrators** will appear.
4. You have the option to choose from the **Administrators**, **Coordinators**, **Supervisors**, **Instructors**, and **Workers**.
5. Click on the **Return** button to return to the **Report Menu**.

Name	Office
Abbott, Catharine O.	Habersham County
Abdur-Rahman, Rasheeda S.	Fulton County
Abengowe, Obi C.	Clayton County
Aberham, Abeba T.	Chatham County
Abernathy-Reese, Wanda D.	Fulton County
Abram, Shantrice R.	Richmond County
Ackles, Cheryl	Gwinnett County

Employee Information

1. From the **Supervisor Menu**, click on the **Reports** button.
2. Click on the **User Information** button from the **Reports Menu**.
3. Enter the **Employee ID** in the **Employee ID** field and click on the **View** button.
4. The employee's information will appear: **Emp ID**, **Name**, **Position Area**, **Supervisor**, **Office Contact**, **Home Phone**, **Training Coordinator**, and **E-mail Address**.
5. Click on the **Return** button to return to the **Report Menu**.

00000000	
Jeffrey L. Woods	
Position	DFCS Field Program Specialist
Program Area(s)	Administrative
Supervisor	Not Available
Office Contact	DFCS Education & Training Services Section 2 Peachtree St NW Suite 20 200 Atlanta, GA 30303 Phone: (770) 555-5555 Fax: (770) 555-5555
Home Phone	(770) 555-5555
Email Address	jwoods@dfcs.state.ga.us



Office Employees List

1. From the **Supervisor Menu**, click on the **Reports** button.
2. Click on the **Office List** button from the **Report Menu**.
3. Choose a **County/State DFCS Office** from the drop-down menu and click **Next**.
4. The **County Name**, and the **Employee Name** and **Supervisor** that is located at the county.
5. Click on the **Return** button to return to the **Report Menu**.

Office Employee List - Microsoft Internet Explorer

Address: https://www.gadfcs.org/transcript/supervisor/reports/do_office.jsp

GEORGIA DEPARTMENT OF HUMAN RESOURCES - DIVISION of FAMILY and CHILDREN SERVICES
EDUCATION and TRAINING SERVICES
Registration and Transcript Center

Office Employee List

DFCS Education & Training Services Section

Employee Name	Supervisor
Brasher, Lynda	N/A
Broadhead, Lisa	N/A
Brown, Jeffrey	N/A
Bryant, Demetrice	N/A
Burnham, Barbara C.	N/A
Byrd, Dollie	N/A
Cheese, Jean	AAA Default, Supervisor
Douglas, Pat	N/A
Edwards, L. Denise	N/A

If you have any questions about creating a new worker account and/or registering a worker for a course, please send an email to: ssregistrar@dhr.state.ga.us or ofiregistrar@dhr.state.ga.us



Learning Journal





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