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| Assignment #2 |
| Case Study |
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| **4/14/2013** |

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Course: SOWK 679.10

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As a fairly new manager of the family shelter in the Tikkun organization I am going to critically reflect on my week as a social work leader in this human service organization and develop a plan of action to manage all of my responsibilities and issues that present to me in the work week. Supervision plays a big role in my responsibilities in this organization. For the purposes of this assignment I am going to use Kadushin’s (2002) definition of supervision as comprised of three main functions: administrative, oversight, support and education. As a leader in this case study I am aspiring to be an inspirational supervisor and I recognize that there is not a prescribed way of right or wrong. As Sinek (2013) suggests, “It’s not what you do it’s how you do it.”

**List of Issues, priorities and key supports**

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| **Issue/ Task** | **Priority level** | **Key supports** |
| Service user calls to complain about the treatment of her child and is threatening to call the media. | **Important- First priority for the day**-To be dealt with immediately. | * Staff member who is directly involved
* Other staff members who were working
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| Concern about my statements made to the media re: funding for the breakfast program. Concern I have damaged my relationship and the organizations relationship with a funding partner | **Important** but can be dealt with prior to media release on Thursday. After releaseprepare for meeting with funder next week.- **High Priority** | * My Director/ CEO
* Tikkun’s Communications officer
* Funder who I am concerned about
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| Overall concern for the sustainability of the breakfast program (related to above) | Requires Immediate and focused attention to develop a strategy to address the issue.Attend meeting with volunteers on Wednesday.- **High Priority** | * Requires support from your Director and perhaps the Director of Fundraising and Advocacy and CEO
* Community networks
* Staff, including Volunteers within the organization
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| Sustainable funding for the Family Shelter | Important but an ongoing issue- does not need immediate attention or action | * Members of the research project
* Staff, volunteers, director who may have ideas.
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| Cell phone is out of battery and I haven’t been accessible to staff all evening | Small issue- deal with and rectify the issue immediately and move on. | * Not applicable
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| Meeting with staff* I lose my temper
* Staff are worrying about breakfast program
 | Medium priority- to be dealt with at next staff meeting.  | * Staff members
* Colleagues and Director for support
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| Difficulty connecting with new employee during supervision | Medium priority- attempt to deal with during supervision and ongoing | * Staff member
* Director during your own supervision
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| Managing the advice of a long term employee who supports you. | Maintenance of this relationship is important and needs to be appropriate. Does not require follow up | * This staff member is loyal and concerned for your well- being
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| Ensure a productive group supervision session is provided for 3 Family shelter staff.  | Although not ideal, supervision is provided this week with a task oriented approach.  | * 3 supervisees that require supervision
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| Complaint of board member re: your programs and leadership | **High priority**- requires **immediate follow up** with supervisor | * Director, CEO
* Maintain relationship on phone with board member
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| Facebook Concern | low priority -will assist with working group but will not lead project | * Other colleagues
* Facebook Working group
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**My plan of action**

**Service user complaint**

One of my underlying philosophies as a leader is servant leadership. I believe that I am in my position to serve not only staff members but first and foremost the clients that require our programs and assistance. Client- centered care is always a priority. Dealing with client complaints immediately sends a message to the client that they are respected and taken seriously it is also a way to role model to staff that client service is important. Dealing with the complaint immediately can often resolve the perceived issue or prevent it from getting larger than it needs to be. I would see my role as a leader to follow up with the complaint on Monday morning so I am able to put it behind me and get on to the rest of the week. Henein and Morissette (2007) suggest that leaders “need to create an environment where people are heard, allowed to explore and ask questions. Real leaders facilitate, encourage and listen.”

**What would I do differently?**

When I am unable to reach the staff at the shelter I continue trying even if that means that I need to physically go to the shelter and talk with staff before my afternoon research meeting -It appears that lunch is going to be served, meeting is from 12-5 pm so if I need to be late I can miss the lunch portion of the meeting and grab something on my way. If I cannot get a hold of the staff member involved immediately- I seek out the service user who is upset and talk with her in person. I give her an opportunity to be heard, find out more details, from her perspective, about the situation and try to assure her that her concerns are being taken seriously. I explain that I need to discuss the issue with the staff person involved and give her a timeline when I will be in contact with her about how the situation will be dealt with. It would be my intention to de-escalate the situation with the client, listen to her side of the story and then find a way to get the staff members’ perspective before deciding on how to deal with the situation. After my conversation with the client I again try to leave a message (by email, and note for next shift) for the staff person to contact me on my cell phone when she/he is back to work. It is important not to side with the client and to also be supportive of the staff member. My goal is to gather all of the facts about the situation and if appropriate try and bring the staff member and client together to discuss the event in hope of finding a resolution. If the situation is more serious I would continue to gather more collateral information before deciding on how to proceed.

I am glad that the employee involved in the complaint calls me on my cell phone on Monday as I am leaving the research meeting. She is just starting her evening shift at the shelter. I explain the complaint I received that morning and ask her to explain what happened. She admits that she lost her temper with the child. She says she is under a lot of stress at work because her fellow staff members are not assisting her with all of the things that needed to be done. She is prepared to apologize for taking it out on the child. She tells me that she will talk with the client and if she needs my help she will call. She is going on days off for 5 days starting Wednesday at midnight and would prefer to deal with it before she goes. You agree to her trying to discuss the situation with the client and make a note on your iPhone to follow up on Wednesday afternoon. On Wednesday afternoon you find out that the issue was resolved between the staff member and the client on their own. We will still need to address the staff teamwork issues through supervision and the next few staff meetings.

**Concern regarding my statements to the media**

This situation shows how important support from media personnel is. Preparation with notes are helpful in dealing with the media to ensure your message is clear and concise and that you say what you mean so that your comments do not get misconstrued or that emotion gets you into trouble. I believe that very few people are able to talk with the media “off the top of their head.” Preparation is essential. Communications personnel can assist with preparation.

**What would I do differently?**

I ask for assistance from the communications department on what I should say and what anticipated questions could arise the week prior to the interview. I make notes to refer to during the interview. If I make statements that I was concerned about I ensure that I speak with my supervisor regarding my concerns and also contact the funder and express my worries about what I said before the media released the interview/ article. The conversation with my supervisor allows him the opportunity to be prepared so that he does not get blindsided by someone complaining to him later on in the week and I can ensure that he is okay with me contacting the funder to apologize for how my statements may come off in the interview. A conversation with the funder would be difficult but it may allow for an opportunity to apologize before they hear the statements on the radio or read them in the newspaper. It may also allow for a frank discussion regarding my concerns about the breakfast program.

**Sustainable funding for the Family Shelter**

Funding is an overarching issue/ concern in both of the programs I am responsible for however, this is not going to be resolved today. I will ensure that it remains at the top of my priority list to ensure that I am continually thinking of creative ways to assist with finding sustainable funding. Although the research project meeting did not seem to be useful today, I will cut my loses and think of my time spent as a long term investment into a broader, bigger issue for my department.

**Uncharged cell phone**

What a busy day! Once I discovered that my cell phone battery was drained I would make a quick call to the shelter before bed to ensure that the staff members were okay and not trying to get ahold of me and tell them I would check in tomorrow. I would put the phone on my charger and go to bed.

**Staff meeting**

During lunch I critically reflect on the morning staff meeting and acknowledge that I am overwhelmed. Staff are telling me that I am not available enough and that they are concerned about the sustainability of the breakfast program, I am also concerned. Losing my temper and becoming defensive was my reaction to feeling incompetent, and vulnerable. I intend to rectify the situation by apologizing to the staff through an email for losing my temper, and acknowledging that I have been less available. I will also acknowledge my concern for the breakfast program and let staff know that I would like them to come prepared to our next meeting to brainstorm and come up with potential ideas to address the increase demands and decrease in donations to our breakfast program. I recognize that an email may not be the best way to apologize to staff but I know that I will not see all of them until our next meeting.

**Supervision with new staff member**

I feel that the beginning stage of supervision is the most crucial in establishing a good relationship. Davy and Beddhoe (2010) point out that how supervisors and supervisees relate to each other in the beginning is extremely important and sets the stage for how the relationship will be in the future. The quality of this relationship determines the success or quality of the subsequent relationship.

 Half way through the supervision session with the new staff member I realize she is not ready to discuss much with me. I decide to pull out a supervision contract and explain what the purpose of the contract is and how we will use it as a foundation for her supervision. I explain my role in providing administrative and clinical supervision and I ask her what she hopes to get out of our time together and I share with her why I found supervision with my past supervisor so valuable when I was doing front line work. I loved to hear stories from my supervisor and remember how her stories made me develop a connection with her. Baldwin (2005) states: “The use of story creates space for connection to others, and such is a powerful way of building relationships and inviting creativity within the supervision relationship. The use of story can be inspirational; harnessing people’s energy and talents in ways that produce positive outcomes.” I give her a copy of the supervision contract and ask her to give it some thought and we make plans to work on it during her next scheduled session. She tells me that she doesn’t have anything else to discuss today although I can tell she is starting to feel more at ease by her reaction to me and her body language. I am reminded about my readings from Henderson (2009) that the relationship between the supervisor and supervisee needs to be prioritized over the goals of supervision. Because we have ended early, I invite her to join me for a quick cup of coffee in the coffee room before my next supervision session in hope that I can get to know her on a more personal level and start to build our working relationship together.

**Supervision with long time staff member**

I second guess my disclosure to this staff member although I know that he is a trustworthy and a safe place to vent. I do recognize he is probably not the most appropriate person to be confiding in. I reflect on our conversation and remember that he has a way of egging me on when I am frustrated and I decide to take a step back and decide how I am going to tackle my discussion with my Director about how overwhelmed I am and ask for some help and guidance in managing all of my responsibilities. I decide that I am going to be strategic in my presentation of my case to my Director. I have already initiated how I am going to deal with my blow up in the staff meeting this morning and I do not think I was justified in doing so. I have no plans to confront the staff as I feel that they were justified in sharing their concerns with me.

**Wine and Cheese**

Of all of the days to wear jeans! I find a pair of heels in my office cupboard, put on some lipstick and borrow a suit jacket and scarf from my close friend and colleague as she is walking out the door, promising to bring them back in the morning. I wish I wore a suit today but I will be able to pull off my attire without looking too out of place. I will never make it home and back in time for the event. I plan better next time.

**Group Supervision in the Family Shelter**

Although my preference would be individual supervision, in the sake of time I bring together 3 staff members for group supervision from the Family Shelter. My goal is to use a reflective model of supervision (Davy and Beddoe, 2010). This model supports collaboration, experiential learning, is supervisee directed, reflective and strength-based. My style in group supervision today is more task-orientated than in individual supervision where I tend to focus more on fostering relationships with the supervisees. My goal of group supervision today is mainly an administrative focus opposed to clinical supervision. I want to bring together three staff members that have a similar role in the shelter. First, I do a brief check in with all of them to see what is going on for them personally and professionally. This will take 15- 20 minutes. Secondly, I review any issues they may have collectively as a team, ask for feedback and potential solutions to the issues and come up with a plan of action. Some issues may require more investigation, tasks and follow up are divided equally amongst the supervisees. I take on only the things that require my assistance (such as budget related issues or follow up with senior managers). We can come up with some solutions collectively for other issues that surfaced and find an immediate resolve. I allot 30 minutes for this. For the last 30-40 minutes of our time together I bring up the topic of teamwork. I do not bring up the issue that has arisen this week as the employee that was directly involved is not here. I ask the supervisees how they would rate their work environment on a scale from 1-10 on teamwork and provide a few examples/ reasons as why they rated their team the way they did. I then ask them to come up with one example each of a small and practical thing that could be implemented quickly to improve teamwork in the family shelter. The issue of the other evening surfaces and I ask them to provide me with their perspective of the event and let them know that there will be more follow up on that particular issue next week. I ensure that an action plan is recorded in our minutes and who agreed to follow up on what is also recorded. The minutes will be distributed to everyone in our session today by one of the supervisees. We do one last check in with everyone to ensure they do not have any burning issues and I assure them that we will go back to our individual sessions in two weeks. I ask them to think about their thoughts on alternating between individual and group session every two weeks. We will discuss their preferences in our individual sessions next time. The supervision session ends up going ok, I found the staff to be a little more reserved than usual but I know they also prefer one- on- one supervision. We had a good conversation regarding teamwork and a couple of great suggestions are going to be implemented by the three staff members present.

 **Meetings with volunteers to discuss concerns regarding the funding for the breakfast program**

I enthusiastically meet with the volunteers to discuss their concerns regarding the breakfast program. Both of the volunteers are well connected in the community and believe strongly in the program. They both have good intentions and want to see the program continue. I take a breath and go into the meeting with the intention to hear what they have to say. I intentionally think about what I am going to disclose to the volunteers prior to our meeting. I do not disclose the seriousness of the issue at this time, although from working in the program they recognize that the demand has increased and the donations have decreased. I ask if they have any suggestion on improving the program or funding to the program. I carefully take notes and listen to what they have to say. They have some great suggestions to change the menu in order to save money and have other suggestions on how we can save additional money as well. I assure them that the program is important to me and to the organization and let them know that I am committed to ensuring that the program will continue. I thank them for their commitment to the program and let them know how important their work and dedication is to me. I feel that before I reveal the scope of the issue to these two volunteers I must first discuss the situation in its entirety with my Director and also present a potential strategy to him. I have lots of work to do. I will also suggest that we gather the staff involved in the breakfast program and ask for their feedback and assistance in potential solutions to the issue. I recognize that I can no longer deal with this on my own. I leave the meeting with the volunteers with some renewed hope that I am not in this alone.

**Funder of the Breakfast Program calls a meeting with you for next week – they are upset about the recent media event.**

Although I tried to do some damage control at the beginning of the week I was unsuccessful in making amends with the funder. I may have softened the blow with my apology and expressing upfront concerns about my statements to the media but the funder is still upset and requests a meeting for next week. I have sent an email to my supervisor so he is aware of what I have done. I have not yet heard back from him or his take on the situation. It is the end of the day and the phone rings. The staff member that I have asked to gather statistical information and client testimonies from is unable to provide me with the data that I need. Because she is really upset and crying I take the time to assure her that I will come there tomorrow afternoon and assist her with gathering the data that I need. I want her to know that she has my support and if she needs help I am willing to come and assist her. I also let her know that we will look into additional database training if she feels that would help her. I ask her if she will focus on gathering client testimonials tomorrow and Monday morning, I ask her to enlist help from some of the other staff members and volunteers. If the staff can find five or ten testimonials from clients who use the service it would help immensely in my meeting next week. I ask her to be available to assist me with going through our paper records on Friday afternoon if we are not able to pull the data from the database. I remind myself by putting a note in my iPhone to make arrangements for my children tonight so I can stay late at the shelter tomorrow if I need to. The staff member has calmed down and agrees to assist in finding some testimonials. I am committed to staying until the statistics are gathered and the reports are run.

**Concern from Board Member who calls me directly**

Although the call from the board member is not appropriate, I thank her for calling me and sharing her concerns about the program and thank her for feedback on my leadership. I pull out my top drawer and read the sticky in my desk that says 1) state your perspective. 2) Explain the impact 3) Ask if they are willing to talk about it. (I put this in my desk after a workshop on crucial conversations.) The sticky helps me to keep my emotions in check and go through the motions of what I need to say in an organized way. Although I am upset about her remarks I try my best to explain to her that she needs to involve the CEO and my Director in her neighbor’s complaint. I agree to a meeting with her but explain that I will be contacting my Director to attend the meeting with me. I explain that he or the CEO will most likely be in contact with her next week as it is not typical that I would be allowed to meet directly with a board member about a concern. My plan is to meet with My Director first thing tomorrow morning or immediately following our staff meeting tomorrow. I call and leave a message on his voicemail regarding the phone call immediately and wait until tomorrow so I can discuss the situation. I am expecting that he or the CEO will call the board member and address the situation on my behalf. I am embarrassed by this complaint and start to worry that my Director is thinking I am incompetent. I do however think that I will not be the one dealing directly with this situation and feel that developing a strategy for sustaining the breakfast program and again sharing my concerns about how overwhelmed I have been is critical in my next supervision session. I put these two issues at the top of the list for discussion.

**Facebook issue – Organizational policy required**

I am unaware of anyone in my department that is involved in the Facebook situation. However, I ask the other manager to share the list of involved staff members with the rest of us and ask his perspective on their involvement. I suggest that an organization wide policy be developed in case this happens again regardless of if my staff are involved this time or not. I agree to sit on a working group to assist with the policy but I do not agree to take the lead as I feel that I have too much on my plate. I take a sigh of relief that I do not have any staff currently involved in the Facebook situation and agree to meet with the working group in two weeks’ time to get started on a recommended policy. It should not take us more than a couple of brief meeting to draft something for senior leadership to review.

*Choose ONE situation in his case. Analyze the overall issue (s) and your imaginings about it.*

**Strategic plan to address funding for the Breakfast Program**

It is Friday afternoon and I go down to the Family Shelter to gather statistics for the meeting with the funder next week. I am unable to meet with my Director until Monday afternoon regarding the phone call from the board member. I plan to discuss my issue of feeling overwhelmed as I think that the complaint relates to this. I also want to present my plan of action for how to save the breakfast program.

The staff member that is willing to assist me is ready to get started. She has already received 6 testimonials from clients utilizing the service. I ask the administrative assistant to type them up for me and email them to my office- I will use the testimonials in my document that I will prepare for next weeks’ meeting.

Unfortunately we find that the database is in fact not working. Thankfully we still have all of the sign in sheets from the last few years of the program. The staff member starts to count the service utilization to see if we can show the high increase on demand to the program over the last 6-8 months. She goes through the sign in sheets over the last 18 months. It shows that the demand for the program has gone up 100% in the last eight months. It is not a surprise that we are over budget. We also look at our donation records and can show that our donations have decreased by 25% over the last 12 months. I need help determining concrete outcome measures for this program. I make a note to discuss this with my director. With these critical pieces of information in hand, I thank the staff member who assisted me. I stay at the program for a while and talk with some of the staff and volunteers informally. I share our finding and ask if they have any suggestions on how we can manage the demands of the program. A couple of the staff members have some great ideas for fundraising and have heard of a grocery store that is willing to partner with our program. They give me the contact information of the grocer.

Since I have made arrangements for my daughters to go to friends’ houses afterschool I decide to go back to my office and investigate some potential grant opportunities for the breakfast program. The office is quiet as everyone has gone home. I decide to stay until 7:30PM and then go home for supper with my family. I find one grant opportunity that I think we have a real good chance at for the breakfast program and my spirits are somewhat lifted.

I spend the last hour working on preparing for my meeting with my supervisor. I have written up a nice document that provides the statistics for the breakfast program, the testimonials and a plan of action to improve the finding situation. As I critically reflect on the last year I pull out Stoltenberg’s stages of supervision that were shared with me during a supervision session. I recognize that I am still in the beginning phase of learning how to be a supervisor. I think that my biggest mistake is trying to be an “expert” and not reaching out to others. I aspire to use a reflective model of supervision but when I think critically I have not been using this model so well. I need to trust the staff in the programs and collaborate more. They are really smart and I need to utilize their strengths to come up with some solutions to our funding dilemma. We may need to try and few things before getting it exactly right-and I need to be okay with that. I also realize that I have given a lot of lip service to the importance of relationships in supervision but I have not used the relationships that I have fostered over the years to support me in my new role. I need to be okay with showing my vulnerability to others and take more time to foster the relationships in my department and with my colleagues. If I really examine this, I think this is why I am feeling so overwhelmed. I really do like my new position. I want to do the right thing and be a good supervisor. I plan to take responsibility for my mistakes this past week and work with my supervisor to figure out a way through the issues I am facing. I am looking forward to our meeting on Monday. It will feel good to discuss all of the things I have been trying to manage on my own. Before I leave the office I sit down and watch my favorite Ted Talk on Vulnerability by Dr. Brene Brown.

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