MICHIGAN STATE UNIVERSITY
SCHOOL OF SOCIAL WORK

Staff Retention in Child and Family Services

The First Six Months

Workbook 5

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Dedication

This workbook series is dedicated to child and family service supervisors everywhere who work tirelessly with their staff to make the world a better place for children and families at risk.

Acknowledgements

First, we gratefully acknowledge the authors, Judith McKenzie, John McKenzie and Rosemary Jackson, for their incredible commitment in developing this unique and useful workbook series. This inspired team brought years of child and family service experience and a sense of urgency to the work that comes from “knowing” that children and their families need a stable workforce to help them realize their potential and that effective child and family service supervisors hold the key to staff retention.

We wish to thank the Michigan Department of Human Services and the Michigan Federation for Children and Families for providing resources and support for this project.

Special thanks to our advisory committee members who generously volunteered their stories, expertise and time in reviewing and testing the materials for the workbook series: *Staff Retention in Child and Family Service.* These people and their agencies include:

Cindy Ahmad, Training Manager, Michigan Department of Human Services
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Jeff Roley, Professional Development and Training Coordinator, Eagle Village
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Catholic Charities of Shiawassee & Genesee Counties, Flint, Michigan
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Contents at a Glance

Introduction to Workbook Series

Purpose of this Series

The purpose of this training and series of workbooks is to increase child and family service agencies' effectiveness in developing and retaining their staff by applying information from research and best retention practices to their work.

The foundation for this material is the important mission of child and family service to provide safety, permanence and well being for children, within a context of family-centered practice. Underpinning this foundation is a heightened sensitivity to the potential impact of significant emotional events on child and family service professionals which can lead to excessive stress, burnout and, possibly, secondary trauma. Case materials, tools and skills integrated throughout this workbook series intend to honor and support leaders and supervisors as they cope with the value dilemmas and emotional content found in the "real world" of child and family services.

The ultimate goal of this curriculum is to improve retention practices and outcomes for child and family service agencies. With such an end in mind everybody wins: the staff, the agency, the families and children, and especially the supervisor, whose life is vastly improved by having a stable, loyal workforce.

This curriculum has been designed with a series of workbooks. A workbook is provided for each of the following subjects in the core curriculum series.

Workbook 1 – The Role of Leaders in Staff Retention: provides information, tools and methods for leaders to use to support supervisors in creating and sustaining a positive culture for staff retention.

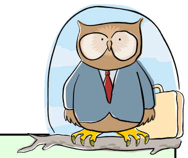
Workbook 2 – The Practice of Retention-Focused Supervision: provides research information and supervisory competencies for retaining effective staff, including self-assessment and planning tools. It includes methods and tools for setting objectives, structuring the supervisory process and managing stress in the workplace.

Workbook 3 – Working with Differences: provides understanding, methods and tools for tailoring supervision to the diverse characteristics, learning and behavioral styles and professional development needs of staff.

Workbook 4 – Communications Skills: provides specific information, tools and activities to adapt communication skills to the supervisory relationship.

Workbook 5 – The First Six Months: provides a structure, methods and tools for orienting, supporting and training new staff during their first six months on the job, with particular attention to helping staff cope with and manage the stressors of the job.

Workbook 6 – Recruiting and Selecting the Right Staff in Child and Family Service: provides information on promising practices and tools for recruiting and selecting front line staff; includes profiles of desirable qualities needed in front-line supervisors and staff and methods for developing effective collaborations with universities.



Child Welfare is not rocket science. It's harder than rocket science.

- David Liederman, former CWLA CEO

The Underlying Principles of this Training Curriculum

The *Staff Retention in Child and Family Service* workbook series is based on a review of research literature in child and family service, human services and business. The research focused on the many studies that have to do with staff turnover and retention. Additionally, resilient workers and supervisors who stayed with their current agencies for at least two years were interviewed and surveyed in public and private agencies throughout Michigan to determine what underpins their commitment to the field. There was a strong consensus about what was learned about workplace retention across business, human service work and child and family service, but there were also some significant differences. Understanding the differences between child and family service and business is critical to retaining and developing staff in human service. Those differences are fundamental to the approach that is expressed in this training program and are summarized as follows:

Child and family service is challenging and life-changing work

Child and family service staff, many of whom are young and inexperienced, often make "god-like" decisions every day that have profound effects on the lives and destinies of children and their families. They see and experience the most tragic human conditions, extreme poverty, child neglect and abuse, inter-generational violence and substance abuse. Yet, they have to find a way to assure safety of children while working toward permanence and well being for both children and their families. Child and family service staff do this in a system that is under-funded, under-staffed, and sometimes chaotic and hardened to the plight of the people who are served by it and those who work in it.

This curriculum does not minimize the difficulties of the work (the reality of low pay, high workloads, and high turnover) but it doesn't belabor these issues either. It recognizes that these issues need to be addressed, especially when an agency is not competitive with other similar agencies offering the same service. This curriculum stresses that child and family service retention rates can be improved by understanding and building upon those resilient factors that attract people to and keep them in the profession.

Child and family service is mission and values centered

Those who enter the profession of child and family service are not motivated by profit. They are mission-driven. They are usually motivated by "doing good and making a difference" for others, particularly children who have been victimized. They come to accept that child and family service work is mainly about working with and through parents.

This curriculum offers an understanding of the mission and value-centered nature of this work as a context for all of the materials developed. To undervalue the significance of idealism and a need to help others in the motivation of staff would be wrong. The concept of mission is what energizes child and family service people and needs to be reinforced at every step of the retention process. Attention to feelings, showing appreciation and strengthening resiliency are essential for prevention of burnout and achieving good outcomes for children and families.

The supervisor in child and family service is the most influential person in staff retention
The research shows that having a good relationship with the front line "boss" or supervisor is one of the most important factors in retention. This is even more essential in child and family service due to the stressful nature of the work. Managing one's own feelings and learning effective relationship skills to help others manage their feelings and assumptions are a big part of the work that has to be done. The inadequacies of the system, along with the multiple demands and challenging relationships, can cause stress, burnout and result in "secondary trauma" for child and family service staff. An effective supervisor will facilitate professional development of his/her staff by consistently modeling effective relationship and strengths-oriented behaviors that help staff grow through their most difficult and/or emotionally charged times and events. An effective supervisor will pay attention to the personal and professional growth needs of their staff and offer recognition, encouragement and support. To do this well, supervisors have to be aware of their own vulnerabilities, while building on their personal style and strengths.

What a new staff person experiences within the first year is crucial to retention
An experienced supervisor recognizes that over half of turnover occurs in a staff person's first year on the job. What a staff person first experiences, especially with their supervisor, will determine whether he/she will stay with the agency and ultimately build a career in child and family service.

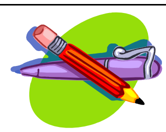
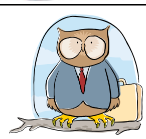
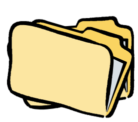
Respect for a person's strengths, uniqueness, and rights are the primary elements in the success of all staff retention efforts
How a staff person is treated by the agency and, in particular, by his/her supervisor will become a mirror for how clients will be treated by staff. Honoring and building on staff strengths, including the individual's capacity to cope with stress, learn and change, is key to successful retention in child and family service. Preserving the dignity of the individual is not only important in staff retention. It is a principle that is essential to achieving positive outcomes with families. A fundamental belief in the resiliency of people provides a reservoir of hope in child and family service.

This training curriculum takes the view that all participants: agency leaders, supervisors and staff, are partners in improving retention of staff in child and family service. The agency's culture for retention will be continuously improved only to the extent that people share and learn from one another. Training materials, language and case examples are designed to be strengths-based and respectful of public and private agencies, supervisors, staff and families.

How to Use this Workbook

This training curriculum uses a workbook format for the following reasons:

- Participants who attend a training session have the information and tools at their fingertips to use as reference long after they attend the training
- Individuals can benefit from the program by using the workbooks as self-study tools, if they cannot attend a group training
- Learning activities appear throughout each workbook to encourage agencies and staff to use the materials in small groups during formal staff training or more informal sessions
- Participants attending the training can share the materials and coach others through the program
- Agencies can use the units within workbooks to review and build specific competencies e.g., when a supervisor is new to the position, following a performance review and/or when a need specific to the agency has been identified

Icon	Description
	**Activity –** this icon represents an activity that can be used by an individual for self-reflection and/or for small group discussions.
	**Small Group Activity –** this icon represents an activity that is best done in small groups where individuals can share insights and learn from each other.
	**Quotes –** this icon is to represent words of wisdom that are meant to be inspirational or to bring home an important point to the user.
	**Case Study –** this icon represents a case study where content from the workbook is applied to typical supervisor/staff situations and interactions.
	**Important Points to remember –** this icon represents a summary of the key points contained in the workbook unit.
	**Tools –** this icon represents a tool that can be adapted and used in the workplace to further enhance the supervisor's repertoire. All tools are provided in the appendix of each workbook for duplication and use in quantity.

Debriefing Small Group Activities

When discussion questions and/or other activities are used in a small group, it is helpful for someone to act as a facilitator and recorder of notes to engage the group in responding to at least two additional questions:

- What lessons did we learn from this experience?
- What implications does this have for what we will continue to do, start or stop doing in the future?

Sequence of Workbooks

All the workbooks were designed to stand-alone and can be used in any sequence based on the organization's and/or an individual's needs and priorities.

Each workbook has numbered units. For example Unit 3 in Workbook 3 will be numbered Unit 3.3. Units extracted from a workbook can be used in management and supervisory staff meetings, brief "Lunch and Learn" sessions, or in supervisor support groups. Using this material in the workplace is highly recommended because the sharing of ideas and synergy among like-minded people can aid and support individual growth and/or agency-wide culture change.

Participants can feel free to duplicate and share all activities and tools contained in these workbooks. Please acknowledge the source of the information when reproducing the materials.

Workbook 5 Table of Contents

5.0 The First Six Months

Learning Objectives:

- Understand the distinct phases a child and family service staff typically goes through during the first six months on the job
- Increase awareness of the emotions and changing levels of confidence associated with each of these phases
- Develop and practice supervisory competencies and tools to aid in retaining and developing staff through each phase—from the initial interview to completion of their first six months on the job

This workbook and training program will focus on understanding and dealing with a staff person's first six months on the job. Many agencies are now calling this the "orientation" phase of employment, which usually ends with an employee's comprehensive six-month performance review and, possibly, a career development plan. By focusing on the first six months, supervisors have an opportunity to sharpen and practice their retention skills through the use of the structured format offered in this workbook. Lessons learned from this program can also be tailored to focusing supervision and agency practices on valuing and retaining experienced staff.

5.1 Characterizing the First Six Months of Employment

Importance of the First Year

Research indicates that child and family service staff make a decision to stay or leave the field early on, usually within the first two years of employment. An individual's initial experience with supervision plays a significant part in that decision. One study of turnover rates in Michigan reported that 47% of staff who leave foster care in the private sector, leave within the first year of employment (Michigan Federation for Children and Families, 2000). Given this information, focusing on supervisory roles and relevant supervisory retention practices in the first six months on the job seems vital to retaining effective child and family service staff. In particular, getting the new staff person started on the right path could have significant impact on the individual's decision to pursue a long-term career in child and family service.

Emotional Phases of Change

Having emotional reactions to change and loss is a part of the human condition. When confronted by significant change, it is normal to go through a series of predictable emotional stages or phases. Dr. Elisabeth Kübler-Ross, in her breakthrough work, *On Death and Dying,* identified five stages of emotional responses. These are denial, anger, bargaining, depression, and acceptance. As in all models, a person's progression through these emotional states is not necessarily linear, but instead is likely to ebb and flow. A person may stay in some stages much longer than others, depending on the intensity of the loss or change, and the individual's unique psychological makeup.

Likewise, there are emotional phases people go through even when dealing with a perceived positive change such as taking on a new job [1]. The following graphic depicts the phases a new staff person typically goes through during the first six months on the job. This phase can be an emotional rollercoaster where the staff person's confidence moves from high to low and, with effective support and mentoring, can move back to high again. Like a rollercoaster there are many ups and downs. This is a normal process associated with any major change and/or new endeavor. These phases are described as follows:

Uninformed Certainty – in the beginning, a person's confidence is at a level from medium to high. He/she wants this new endeavor to work out but really doesn't know enough about it to be really sure. The staff person is in a bit of a dream state at this phase.

Informed Doubt – as time moves on the person is confronted with the stark realities of this new situation with all its blemishes and warts and, consequently, confidence plummets. This phase is often referred to as 'buyer's remorse' where a person second guesses the original decision and

[1] The positive change cycle has been adapted from the change management literature in particular the work of Implementation Management Associates (IMA) www.imaworldwide.com/home.asp and Dan Johnston, Ph.D. *Lessons for Living* www.lessons4living.com/cycle_of_change.htm.

wants to get out. This is a time of high stress and the staff person can become quite disappointed with the new endeavor.

- *Open Reaction* – is when the person is quite vocal about his/her situation. The person expresses doubts and feelings directly. This may be disruptive and annoying, but can be useful because a supervisor can see what is going on and can help the person through it.
- *Hidden Reaction* – is when the person goes ‘under ground’. He/she bottles up doubts and feelings, and does not express them directly. This type of reaction is much more difficult to deal with. A supervisor must have strategies to probe and discover what is behind certain behaviors or attitudes to help the person cope with what is really going on.

Realistic Concern – the person has now come through the worst of it. He/she has a much more realistic understanding of the new endeavor and has hope that he/she can indeed deal with it. The blemishes and warts are offset by the benefits. There is still much to learn but the person is now on the way to improved self-awareness and confidence.

Informed Certainty – time is marching on, the person is now much more familiar with the ins and outs of the new endeavor and confidence is even higher. He/she can make this happen and he/she feels a certain satisfaction in having conquered the fears and now feels ownership in this new endeavor.

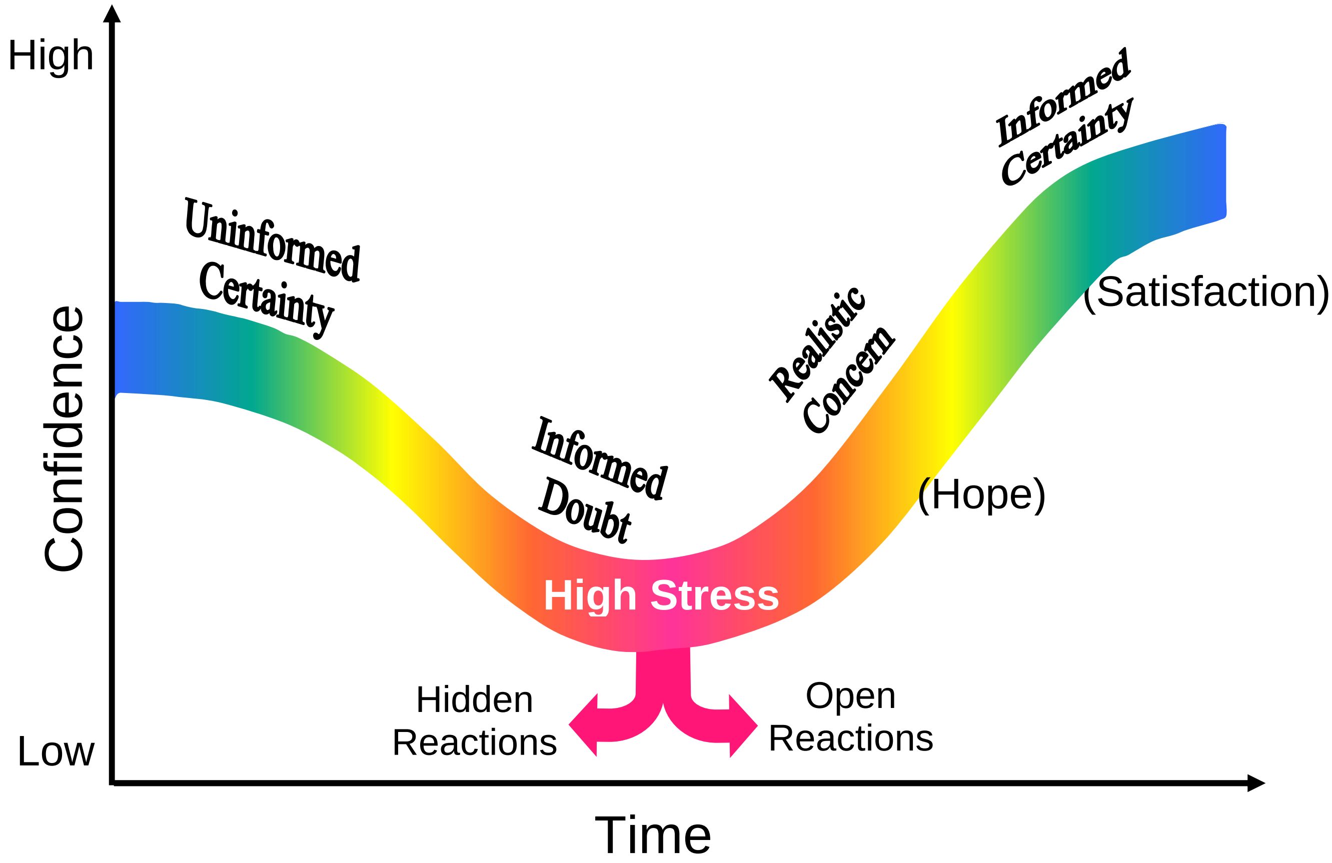
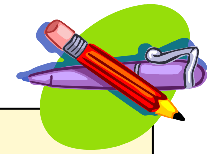


Figure 5.1 Cycle of a Positive Change [2]

An important point to remember is that staff may slide back and forth from one phase to another during their first six months on the job. They may slip back and repeat a phase when confronted by new stressful situations. Staff may also be experiencing multiple phases all at once. That is, one phase in one area of their work and a different phase in another.

[2] The "Cycle of Positive Change" chart has been adapted from Implementation Management Associates

__Activity: Thinking About the Changes Involved in Starting a New Job__



Instructions:

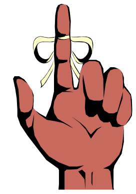
1. Close your eyes and try to remember back to your first six months as a child and family service worker. You had probably gone through years of formal college education. You had some life experiences both good and bad under your belt. Perhaps you had a strong sense that you could make a difference for kids. Then you were given a very challenging and difficult assignment(s)….

2. What was that like for you? How did it make you feel? What personal values might have been in play in this situation?

3. How did you react to the stress you were feeling?

4. Thinking back, where would you place yourself on the *Cycle of Positive Change* at that time?

Important points to remember



- Research indicates that child and family service staff make a decision to stay or leave the field early on, usually within the first two years of employment.

- An individual's initial experience with supervision plays a significant part in their decision to stay or leave the field.

- There are predictable emotional phases people go through when dealing with a change such as taking on a new job. These are:
    - Uninformed certainty
    - Informed doubt
    - Realistic concern
    - Informed certainty

- It is important to remember that new staff may slide back and forth and may repeat an emotional phase when confronted by new stressful situations.

5.2 Significant Emotional Stressors in Child and Family Service

There are built-in stressors associated with direct service work in child and family service that cause emotional reactions on the part of all staff. These stressors may vary somewhat with different program areas, but evoke emotions and reactions that are typical for child and family service staff in any program.

Sources of Stress

In child and family service, stress may originate from at least four main sources. These stressors are particularly potent because they serve to challenge an individual's value system, bring back emotional conflicts from the past and/or are highly indicative of how hard it is to get the job done. Stress may originate from any or all of the listed sources:

Client-related stressors: the emotional pain, violence and abuse experienced by the children and families and the potential to over-identify with the child and/or family

System-related stressors: the conflicting roles and values exhibited by various individuals and systems that have significant external power to affect the conduct and outcome of the work, resulting in a sense of powerlessness

Agency-related stressors: the agency's culture, including policies and procedures, workloads, and perceived lack of support for the individual staff person, resulting in anger and frustration

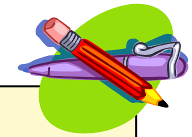
Person-related stressors: can exacerbate other types of job-related stress and may include a variety of factors:

- Degree of stability in the individual's personal life
- Past history of physical or emotional neglect or abuse and/or significant loss
- Past treatment by the agency or a previous employer
- Potential conflict with the individual's personal value system
- Degree of individual flexibility and/or resilience in managing stress

Stress producing events, regardless of the source (s), can be real "hot buttons" for staff and must be dealt with in a sensitive manner. There are critical times when new staff feel particularly vulnerable and open to advice from someone they respect and trust. These are often referred to as "moments of truth" or "teaching moments." They can be the windows of opportunity for mentoring and teaching the new staff person. The experienced supervisor learns to be sensitive to and anticipate these times.

Appropriate supervisory responses to significant emotional stressors are key to helping staff grow and develop on the job. How a supervisor helps a person cope with stress can transform or stop progress. Stress brings energy and that energy is valuable because it can be capitalized upon to aid the learning process. In order to utilize a person's open or hidden reaction to stress, supervisors must learn to embrace it and not avoid it by understanding reactions as information. Supervisors cannot be on top of all of these stress-producing situations. But it is possible to anticipate reactions, be responsive in the moment, and handle the material in more depth in structured supervisory sessions later.

Activity: Working with Significant Emotional Stressors



Instructions:

1. As a group or as an individual, think about the area of child and family service that you supervise.

2. In the first column of the chart that follows, fill in all of the typical stressful events that you can think of for your program area. (See the sample chart, *Significant Emotional Events by Staff Function* in the Resources & Tools section in the Appendix of this workbook as an example).

3. When you have filled in the first column, decide which source of stress you believe to be impacting the event and place a checkmark in the appropriate box(s) to the right.

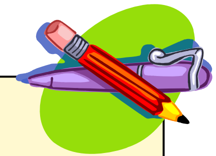
The area of child and family service I supervise is: ____

Stressful Events	Client	System	Agency	Person
Example: *First home call with a birth parent*				

4. Pick one stressful event and list all of the supervisory responses that would be appropriate to alleviate the stress and/or us it as a “learning moment,,” taking into consideration the source(s) of the stress.

Stressful Event	Supervisor’s Response
Example: *First home call with a birth parent*	*Supervisor has new staff person teamed with an experienced person; supervisor debriefs with them both afterward to find out how it went and determine appropriate next steps.*

Activity: Thinking About Stress



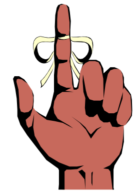
Instructions: As an individual, write in your response to the following questions:

1. How did you feel when you first got your job as a new supervisor?

2. What precipitated your first “crisis of confidence” as a supervisor?

3. What and/or who helped you to get through the low times and onto the next level of confidence?

Important points to remember



- There are built-in stressors associated with direct service work in child and family service that cause emotional reactions on the part of all staff. Examples of these include:
  - Client-related stressors can result in over-identification with a client
  - System-related stressors can result in frustration and feelings of powerlessness
  - Agency-related stressors can result in feeling overwhelmed and not supported
  - Person-related stressors can result in exacerbating work-related stressors

- Appropriate supervisory responses to significant emotional stressors help staff grow and develop on the job.

- There are critical times when new staff feel particularly vulnerable and open to advice from someone they respect and trust. These are often referred to as "moments of truth" or "teaching moments." They can be the windows of opportunity for mentoring and teaching the new staff person. The experienced supervisor learns to be sensitive to and anticipate these times.

5.3 The Supervisory Process in the First Six Months

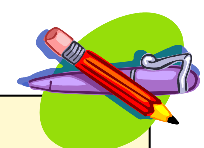
Figure 5.2, The First Six Months, summarizes each of the phases that a new staff person will be going through during the first six months of employment. Each phase does not necessarily represent one month of the new employee's first six months on the job, but is geared more to the individual's progressive assumption of a full workload.

Agencies will differ in timing and practices of assigning workloads. Also, each staff person is an individual and will process integration into the agency differently. This includes varying degrees of intensity (depending on past experiences), personal values, educational level, basic personality and learning style. It is certain that it is normal for staff in all new positions to experience some degree of emotional reaction connected to the growing demands of the workload and workplace in the first six months. In child and family service, it is even more likely because of the emotional nature of the work.

In doing this work, it is important for supervisors to think about the prime objectives they have for each phase of new staff orientation and what it will take to retain new staff during each phase. This is referred to as *Supervisor's focus* in Figure 5.2.

Each phase has been described in its own column. However, this is not to imply a totally linear, rigid progression. Individuals may make progress in one area of their training but still need to work on another. Some of the lines dividing phases are purposely shown as dotted lines on Figure 5.2 to imply this non-rigid relationship between phases.

Activity: Focus of Supervision During the First Six Months



Instructions:

1. As an individual alone or in a small group, review Figure 5.2 *The First Six Months – Focus of Supervision*. Pay special attention to how staff might be feeling during each of the phases. Do you agree with the characterization of the new caseworker's feelings and reactions at each phase? From your experience, what might you add or change about these reactions?

2. As an individual alone or in a small group, decide what your focus of supervision could be for each of these phases. Some examples are provided. See the sample chart in Appendix of this workbook.

3. Is there anything you and/or your group would do differently as a result of this exercise?

Figure 5.2 The First Six Months – Focus of Supervision

Phase	**1 Hiring & Selection**	**2 Initial Orientation**	**3 Formal and Informal Job Training**	**4 Assuming a Workload**	**5 Increased Assignments up to Full Workload**	**6 Normal/Full Workload**
New staff person's feelings and reactions	**Mutual Exploration** Searching & hopeful	**Uninformed Certainty** Initial enthusiasm & confidence	**Uninformed Certainty** Eager to learn and be accepted	**Informed Doubt** Questioning fit, lowered confidence, reacting to the job or supervisor in open or closed manner	**Realistic Concerns** Beginning to understand the responsibility; may be overwhelmed but hopeful	**Informed Certainty** Mentally and emotionally committed (or not) to the job
Supervisor's focus	Hire the right new staff -	Welcome and teach new staff how to navigate the agency	Get new staff person started on the right foot with peers	Provide supervisory structure, support and positive / constructive feedback	Help the worker manage the emotions, stress and higher expectations of the increasing workload	Continue to mentor personal and career development
	See WB 6 Recruiting & Selecting the Right Staff	See Tool: Checklist for Supervisors During New Staff Orientation in Unit 5.5 of this workbook	See Phase 3: Formal & Informal Job Training, in Unit 5.6 of this workbook	See Phase 4: Assuming a Workload, in Unit 5.7 of this workbook	See Phase 5: Increased Assignments, in Unit 5.8 of this workbook	See Phase 6: Normal Full Workload, in Unit 5.9 of this workbook

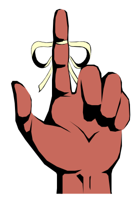
Developmental Phases of the First Six Months

In the following section, each of the "phases" of supervisory intervention in the first six months are described in more detail and promising practices and tools to enhance supervisory practice are provided.

A phased model is being provided to aid supervisors in thinking about and applying skills and tools to the process of integrating a new staff person into the workplace. There are no magic bullets, but there are opportunities for continuous improvement.

This model is intended to help supervisors structure a supportive learning environment that takes into account the stress that staff will normally experience in direct child and family service work. The ultimate goal is to improve retention practices and outcomes in the agency. With such an end in mind everybody wins: the staff, the agency, the families and children, and especially the supervisor, whose life is vastly improved by having a stable, loyal work force.

Important points to remember



- It is normal for staff in all new positions to experience some degree of emotional reaction connected to the growing demands of the workload and workplace in the first six months.
- Supervisor need to understand the prime objectives they have for each of the six phases shown in Figure 5.2 and what it will take to make each phase a success for new staff.
- Each of the six phases will be navigated differently by individual staff depending on who they are and what they bring to the job.
- Agencies will be different in terms of the content and means of providing orientation, informal and formal training to their staff.
- Although models are useful for understanding and breaking down a process, they are not meant to imply a linear, rigid progression of events or activities.
- The tools and methods provided in the workbook series can be applied at any phase when they can help a supervisor meet his/her objectives for the individual staff person.

5.4 Phase 1 – Selection and Hiring of new staff

Objective:

- Hire committed, resilient and productive people
- Treat candidates respectfully and leave them with a good impression of the agency

What is it?
This is the hiring process where prospective candidates are screened, interviewed and selected to fill job openings within the organization.

How might the new staff interviewee feel during this phase?

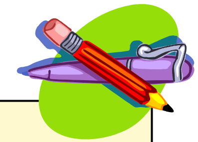
- During this time of pre-employment, the interviewee wants to put his/her best foot forward to get the job.
- He/she may have little knowledge about the job or how to do the work (doesn't have a good grasp of what is involved or required), but does have a great deal of enthusiasm for doing it.
- The interviewee may know very little about the agency but first impressions are formed of the agency and its' representatives, based on how he/she is treated and respected through the interviewing and hiring process.

Note: *Workbook 6 Recruiting and Selecting the Right Staff in Child and Family Services* is dedicated exclusively to this topic. Materials highlighted in this section are treated in more detail in Workbook 6.

"The beginning is the most important part of the work."

- Plato, The Republic. Book II

Activity: Selection and Hiring What/How Resource Chart



Instructions:

1. Review the chart that follows Phase 1: Selection and Hiring – What/How Resource Chart.

2. Think about and write additional "**Whats**" on the chart.

3. Think about and write in the chart your ideas for "**How**" the supervisor can make this happen.

4. Add any **Resources** or tools that you currently use or know about.

5. List some examples of what your agency currently does well when selecting and hiring staff.

6. List some examples of what your agency could do to improve in this area.

Phase 1: Selection and Hiring – What/How Resource Chart

<u>What</u> the supervisor can do	<u>How</u> the supervisor can do this	Resources
1. Cast a large enough net to guarantee a sufficient pool of qualified candidates and advertise in diverse media	• Collaborate with undergrad and graduate social work programs at local universities •	•
2. Hire the right people	• Define the core competencies needed for staff jobs • Match job candidates to job requirements and core competencies • Plan interviewing techniques and behavioral focused questions in advance • Make sure the supervisor is a key person in the hiring decision •	• Candidate profile form • Workbook 6 *Recruiting and Selecting the Right Staff*
3. Have a mutually informative and inclusive interviewing process	• Clearly explain the job and the agency's mission to candidates • Have interviewees meet with staff to discuss the realities of the job and the agency's culture • Encourage prospective staff to make inquires about the agency within the community •	• Workbook 6 *Recruiting and Selecting the Right Staff*
4. Model how staff are treated at the agency during and after the interview	• Follow-up quickly with job candidates regarding any delays and the "yes" or "no" decision to hire •	•

Core Competencies

Hiring committed, resilient and productive people requires careful consideration. The key to this is determining the core competencies necessary for staff to be successful. Core competencies are what make the best people the best at what they do. Often the best advisor for describing what it takes to do well on the job is to ask the “water walkers.” Water walkers are the people who are the best at what they do. Ask these people:

- What has it taken to succeed in this position, both in terms of ability/skills and motivation?
- What personality/behavioral characteristics would a successful candidate for this position possess (e.g., their ability to deal with stress, ability to be an active listener, being flexible and tolerant of diversity, a person’s underlying value system)?
- What are the typical day-to-day tasks that have to get done?
- What technical skills are needed?
- What social skills are needed?
- What is the most difficult part of this job?
- Has the nature of the job changed recently?
- What is most gratifying about this job i.e., what motivates you?

To create core competencies, be sure to summarize the findings of interviews with the water walkers and look for common threads of what makes these people the best at what they do.

Activity: Identifying Core Competencies

Instructions:

As a small group, fill in the *Tool: Profile/Evaluation Form* that follows.

1. Pick a job position that needs to be filled or one that will soon be vacant. Fill in the name of the position on the *Profile/Evaluation Form*.

2. Identify the core competencies job candidates need in each category. Note that some competency areas may have more items relevant to the job and/or your agency’s specific needs than others.

3. Rank each core competency on a scale from one (1) to five (5) as to its relative priority. Note that this ranking field may be used later to score and compare candidates after interviews.

A partially completed Profile/Evaluation Form for the position of Entry Level Child & Family Service Worker may be found in the Appendix of this workbook.

Tool: Profile/Evaluation Form

Candidate's name and contact information:						
Position applying for:						
KEY KNOWLEDGE AND TECHNICAL SKILLS		**Low**				**High**
1.	Example: has the necessary minimum education and experience requirement to qualify for the job. (Specify)	1	2	3	4	5
2.		1	2	3	4	5
3.		1	2	3	4	5
4.		1	2	3	4	5
5.		1	2	3	4	5
6.		1	2	3	4	5
SOCIAL, COMMUNICATION AND COLLABORATIVE SKILLS						
7.	Example: able to read situations and adapt behaviors accordingly	1	2	3	4	5
8.		1	2	3	4	5
9.		1	2	3	4	5
10.		1	2	3	4	5
11.		1	2	3	4	5
12.		1	2	3	4	5

SELF-AWARENESS and SELF-MANAGEMENT		Low				High
13.	Example: able to be open and honest with self and others and take responsibility for his/her own decisions and actions	1	2	3	4	5
14.		1	2	3	4	5
15.		1	2	3	4	5
16.		1	2	3	4	5
17.		1	2	3	4	5
KEY MOTIVATORS						
18.	Example: demonstrates some experience with and has a strong personal commitment for working with families and children at risk	1	2	3	4	5
19.		1	2	3	4	5
20.		1	2	3	4	5
21.		1	2	3	4	5
22.		1	2	3	4	5
OTHER						
23.		1	2	3	4	5
24.		1	2	3	4	5
25.		1	2	3	4	5
Interviewer's signature:		Date:				

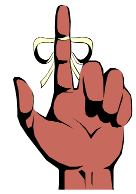
Activity – *Identifying Core Competencies in Phase 1* (continued)

4. Develop at least one prime question in each area that will help you uncover the job candidates' demonstrated abilities.

5. Consider the answers you will be looking for in response to each of the prime questions listed.

Prime question	Desired responses

Important points to remember



- Cast a large enough net to guarantee a sufficient pool of qualified candidates and advertise in diverse media including collaborating with undergrad and graduate social work programs at local universities.

- Hire the right people.
  - Define the core competencies needed by staff to be successful on the job
  - Match job candidates to job requirements and core competencies
  - Plan interviewing techniques and behavioral focused questions in advance
  - Make sure the supervisor is a key person in the hiring decision

- Have a mutually informative and inclusive interviewing process.
  - Clearly explain the job and the agency's mission to candidates
  - Have interviewees meet with staff to discuss the realities of the job and the agency's culture
  - Encourage prospective staff to make inquires about the agency within the community

- Model how staff are treated at the agency during and after interview by following up quickly with job candidates regarding any delays and the yes or no decision to hire.

See *Workbook 6 Recruiting and Selecting the Right Staff*, for more detail on this subject.

5.5 Phase 2 – Initial Orientation

Objectives:

- Help staff feel welcome and teach new staff how to navigate the organization
- Help new staff understand basic job expectations and the link to the agency's mission and values

What is it?
This is the initial orientation to the organization, people and the overall work to be done. Content to be covered during the orientation typically includes a review of the organization's mission, internal policies and procedures and external federal and state requirements.

This is the time when new staff are welcomed into the organization. There are both formal and informal portions to the orientation.

How might the new staff feel during this phase?
This may be considered as a "honeymoon" period for the new staff person. He/she is in a state of *Uninformed Certainty* where his/her vision of what the job and organization is has not yet been tested under the bright light of reality. There is typically a lot of emotion and high anxiety during this phase. The staff person certainly wants this to work out but he/she doesn't know enough about the job or the agency to be certain about how to make it work. During this phase the supervisor of new staff will want to:

- Avoid simply throwing the new staff "to the wolves"
- Implement and adapt the new staff orientation process for each new worker
- Establish guidelines for what it means to be a good team member
- Designate "go to" people for each of the basic job related necessities e.g., how to get supplies, explain administrative issues and the various policies & procedures, etc.
- Prepare the "go to" people to be helpful and welcoming to new staff

Supervisors can work to support and motivate the new staff person by:

- Planning a proper welcoming
- Relating the orientation to the agency's mission and values
- Defining the orientation process
- Scheduling internal and external training for basic skills needed for the first six months
- Having clear expectations for all involved during orientation

A First Day on the Job Story [3]

Heaven or Hell – Take your choice!

An executive of a corporation was crossing the street and, unfortunately, was hit by a car and fatally injured. She met St. Peter at the gate and he told her that they had never had an executive in heaven before and were not quite sure what to do with her, so they decided to give her a choice of whether she wanted to be in heaven or hell. In order for her to make a good decision, they would have her spend a day in each place.

She went first to hell. It was incredible. They were having a golf tournament. Everything was perfect and it was followed by a formal dinner and ball. She got to hang out with a lot of other executives. Later that evening, the devil spoke and he was very impressive. He even sounded like a great guy.

She spent the next day in heaven. It was pretty nice too. She was surrounded by angels and had an opportunity to play the harp and relax most of the day.

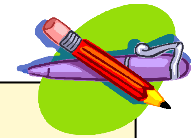
At the end of her day in heaven, St. Peter asked her to make a decision. She said: "I never thought I would think this way, but I really liked my day in hell, so I think I will go there."

She was escorted down the elevator again and when the door opened, she was amazed. There was garbage all around, people were fighting with one another and it was just awful. She went up to the devil and asked him why it was so good the day before and so bad now.

He simply said: "Yesterday we were recruiting you, today you're an employee."

[3] Adapted from *Keeping the People Who Keep You in Business* by Leigh Branham

Activity: Orientation What/How Resource Chart



Instructions:

1. Review the *Phase 2: Orientation – What/How Resource Chart*, that follows.

2. Think about and write-in additional “**Whats**” on the chart.

3. Think about and write-in the chart your ideas for “**How**” the supervisor can make this happen.

4. Add any **Resources** or tools that you currently use or know about.

Phase 2: Orientation – What/How Resource Chart

What the supervisor can do	**How the supervisor can do this**	**Resources**
1. Plan a proper welcoming	• Engage other team members in positively receiving the new member • Have the new person's work station properly outfitted with the supplies and equipment necessary to do the job • Make introductions throughout the agency, including the CEO • Schedule time to meet with your new worker upon their arrival	• Checklist of key staff to interview
2. Relate the orientation to the agency's mission and values		• See *Inspiring Commitment to the Agency's Mission*
3. Define the orientation process	• Have a prepared checklist of things to accomplish during orientation and use it • Teach the new staff person how to effectively navigate through the organization • Assign experienced staff as the "go to" person(s) for the new staff member	• Orientation checklist

<u>What</u> the supervisor can do	<u>How</u> the supervisor can do this	Resources
4. Schedule internal and external training for basic skills needed for the first 6 months		•
5. Have clear expectations for all involved during orientation	• Discuss roles and responsibilities • Put time in the schedule in advance for orientation so it doesn't get bumped by other priority tasks	• *Inspiring Commitment to the Agency's Mission*

Tool: Checklist for Supervisors during New Staff Orientation Week

Do – Prior to First Day

- ❑ Provide key written material, such an employee handbook and other relevant information
- ❑ Arrange for office furnishings, equipment and essential supplies to be in place prior to the arrival of the new staff
- ❑ Consider taking the new person to lunch on or prior to the first day on the job
- ❑ Plan how you want the person to spend their first day
- ❑ Arrange for person-to-person meetings with one or more of your team
- ❑ Make sure to let all staff know when the new staff is expected and ask them to make her/him feel welcome
- ❑ Consider having a welcoming party, breakfast, potluck lunch, etc.
- ❑ Pair up the new staff person with a respected co-worker "buddy" for the first month to help them learn the ropes and to ask such questions as: How are you? How is it going? Do you need any help?
- ❑ Schedule group orientations in the afternoon, so that the new staff has time to settle in and meet one-on-one with their new supervisor
- ❑ Put some basic orientation on CD or website so the staff person can access and review information when needed

Do – First Day

- ❑ Meet with the staff person early in the first day to:
    - o Reaffirm the importance of the staff person's job to the agency's mission
    - o Review job expectations
    - o Set expectations and schedule for the first week, including at least two additional supervisory sessions, one mid week and the other at the end of the first week
- ❑ Provide an orientation checklist that will enable the staff person to take charge of her/his own orientation
- ❑ Introduce the staff person to as many team members and key agency staff as possible and let them form their own opinions of people
- ❑ Have someone show the person around the facility and make sure they know who to go to for what

Do – First Week

- ❑ Make sure the new person is oriented to the computer, fax machine, copy machine, phone system, where to get supplies, etc.
- ❑ Introduce the staff person in a group meeting with enthusiasm and use the time to re-introduce group members and their specialties, interests, etc.
- ❑ Encourage the person to meet with co-workers throughout the first week to get their perspectives on things
- ❑ Give appropriate and challenging assignments in the first week and the first month
- ❑ Schedule the person for relevant in-house and external training and prepare him/her for what he/she should be getting out of training
- ❑ Hold an end of the week meeting with the staff person to set objectives for the first month on the job and review the organization's mission

Tool: Activities for Inspiring Commitment to the Agency's Mission and Values

Mission in the Woodwork
Inspiring commitment to the agency's mission and values starts on day one, but it is not a one-time event. The importance of the agency's mission and values must be reinforced in supervisory sessions and team meetings on an ongoing basis. You know you have been successful in inspiring commitment to mission when others talk about it often and when questions are raised in supervision and staff meetings about management or staff actions that are incongruent with the agency's mission and values.

First Meeting with New Staff
The supervisor discusses the objectives of the agency's orientation program and prepares the staff person for the orientation week. Mission and values of the organization are discussed and the new staff person is provided with a copy.

Introducing New Employees to Other Staff
Ask your employee how she/he wants to be introduced to colleagues and what experiences she/he wants highlighted. When introducing other staff, highlight the person's tenure with the organization and personal contributions.

A Possible Homework Assignment for New Staff
The supervisor informs the new staff person that at the end of the week, he/she will be asked to describe the agency's mission and values from their impressions of their first week on the job. He/she is also asked, at the end of their first week, to set goals for his/her first month on the job.

The supervisor encourages the new staff person to interview other staff about the work of the agency and its mission. Some possible questions a new staff person might ask include:

- What is it about our agency that most attracted you and keeps you here?
- When do you feel that you are most connected to the agency's mission and values?
- What have you learned about the children and families on your workload?
- What barriers get in the way of achieving your goals?
- Who do you seek out to answer specific questions and get help when you need it?

Orientation De-Briefing Meeting with New Staff Person
At the end of the first week, or soon thereafter, the supervisor meets with the new staff person and asks him/her to debrief the week with them. Some questions might include:

- What was most helpful in your orientation?
- What was least helpful?
- What other questions do you have?

Agency Mission and Values Discussion
The supervisor may ask the new staff person about how he/she sees the agency's mission and values now. Some possible questions include:

- What agency values are evident from your observations and interviews?
- Share three things that happened this week that reinforced the agency's mission for you?
- Share three things that disappointed you or may have caused you to question the agency's mission?

The supervisor may also ask the person to write the mission in his/her own words and/or develop a poster, slogan or other way of expressing the agency's mission and values.

Goals Discussion
The supervisor will engage the staff person in setting goals for her/his first month of employment. Some possible questions to ask may be:

- What are your learning goals for the next month?
- How can I help you reach your goals?
- What might stand in your way of reaching your goals?

The supervisor will also explain his/her expectations for the first month and suggest plans relating to the following areas:

- Formal and informal training
- Work assignments
- Job shadowing

The supervisor will set a regular (weekly) schedule of supervisory sessions and stresses the importance of maintaining the schedule

Retention Discussion
The supervisor will reinforce how important committed staff are to the agency and how he/she wants to do everything possible to encourage the staff person to stay and grow with the organization. The supervisor may then:

- Ask the staff person about what will be important to him/her personally in making the decision to stay with the agency
- Ask the new staff person to promise that he/she will come and talk with the supervisor when he/she encounters difficulties and before considering leaving the agency

First Impressions

It's Monday and Alice, a foster care supervisor in a large agency, is rushed as usual. She has gotten to the office early because she has a new foster care worker starting today. When she looks at her calendar, she realizes that she is scheduled to attend supervisory training that day. "How could I have forgotten about that?" she asks herself as she racks her brain to think of what she is going to do with the new worker while she is in training.

Just then the phone rings and personnel HR is on the line, letting her know that her new staff person, Kyra, has finished with them and is on her way down to Alice's office. Alice knows she isn't ready for Kyra. How could she be? She has been covering a caseload since she lost one of her workers three months ago as well as supervising a foster care unit. She really needs Kyra to be able to step right in and take over a caseload.

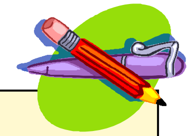
Kyra knocks on the door and steps into Alice's office. Alice remembers how impressed she was with Kyra during the interview process, but she knows that this is Kyra's first job in child welfare after graduating with her master's degree. When she interviewed her, Alice could see that Kyra was enthusiastic and confident, though Kyra was able to admit that she had a lot to learn about foster care. Alice liked that about her and has high hopes that she will be up to the challenges of the job.

Alice greets Kyra and lets her know that she will need to be out of the office for the day, but that she will get her settled into her new office before she leaves. She takes Kyra to a cubicle that is essentially empty except for a large stack of files sitting on the desk. Alice explains that her computer will be set up later that day, but in the meantime she'd like her to read the files on her desk as these are the children and families who will be on her caseload.

As she is leaving, Alice points out some articles on the desk and tells Kyra that she'd like her to read them. Kyra takes a brief glance and says: "This looks like the same information we got in the new worker training." Alice doesn't know what training Kyra has had and makes a mental note to ask her about it when they have a chance to sit down and talk.

Alice tells Kyra that one of the foster care workers in the unit will be by shortly to show her around the office and introduce her to everyone and then she sets off to see if she can find one of her staff to show Kyra around.

Activity: First Impressions



Instructions: Read “First Impressions” and respond to the following:

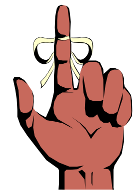
1. Using the tool, *Checklist for Supervisors during New Staff Orientation Week*, (pg. 27) discuss what Alice did well and what she could have done differently to bring Kyra into the agency?

2. After reviewing the tool, *Activities for Inspiring Commitment to the Agency’s Mission and Values*, (pg. 28-29)discuss what Alice could do to reinforce Kyra’s commitment to the mission of the organization

3. What can Alice do to help Kyra take responsibility for her own learning during the first six months of the job?

4. What could be done at your agency to make a new employee’s first day special? For example, hang a nicely made welcome sign in their cubical/work area showing their name and signed by all of his/her new colleagues, give them a “goodie basket” filled with necessary office supplies.

Important points to remember



- A new staff person's first few days on the job is a time of welcoming. It is also a time of first impressions, so treat new staff as if they were special, because they are!

- Prepare a plan for orientation, using the orientation checklist, in advance of the new person's first day on the job.

- There are both formal and informal portions of the orientation phase that include helping the staff person to:
  - Feel welcome
  - Navigate through the organization understand people's various roles and the overall work to be done
  - Understand basic job expectations and the link to the agency's mission and values, internal policies and procedures and external federal and state requirements.

- Inspiring commitment to the agency's mission and values starts on day one and continues throughout the staff person's employment with the agency.

5.6 Phase 3 – Formal and Informal Job Training

Objective:

- Get the new staff person started on the right foot with peers and colleagues
- Establish a supportive and learning-based supervisory relationship
- Begin formal and informal training, including job shadowing opportunities

What is it?
The formal and informal job training and job shadowing phase is where the new staff person begins to learn about the job responsibilities and expectations. He/she may be in the agency's formal training program and/or formal training offered by another entity. He/she may be assigned to work with an administrative level person to learn computerized systems, reports, etc.

This is a time when new staff are given first assignments. This will typically be a time to job shadow a senior member of their team. They may make field visits with a senior member of the team or a supervisor. The new staff person may be asked to observe, fill out paperwork and do other non-direct work with clients while the senior level person models the interviewing and other direct casework.

For further information on job shadowing, please refer to the *Job Shadowing Worksheet* at the back of this workbook.

How might the new staff feel during this phase?
Figure 5.1 *Cycle of a Positive Change* depicts this phase as a time of *Uninformed Certainty* where the new staff person is usually eager to learn and to gain acceptance from their more senior peers. He/she is formulating initial questions of what the job really entails and how to do the work.

During this phase the supervisor can work with the new staff person to recognize the realities of the job while maintaining enthusiasm. How a new staff person reacts to this phase of formal and informal training may depend on his/her personality and learning style. If the person is action-oriented, he/she may be very anxious and want to just get on with the "real work." If he/she is more internally motivated, he/she may welcome this phase for reflection and study. If however, the training is unstructured and open-ended, new staff are likely to be bored.

Recognizing and Appreciating Different Learning Styles

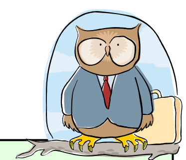
The literature on adult learning informs us that individuals have a variety of different learning styles. These different styles need to be understood and appreciated to maximize the learning experience and how supervisors approach staff with training material.

Workbook 3 *Working with Differences*, in this series, looks at three types of learning styles. It is important to note that these styles contain generalities. Most people have a tendency toward one style or another, but may exhibit traits in several styles. The most helpful way to look at this information is to look for patterns that show more traits in one area then another.

The three learning types are:

- Learns through seeing
- Learns through hearing/talk
- Learns through touching/doing

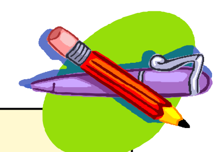
Supervisors and staff who have an understanding of their learning styles can come to an understanding of how they can best work together to maximize learning. The tool, *Suggestions to Aid Learning* in Workbook 3 is designed to help supervisors assist individual staff in their learning process.



"If you don't know where you are going, every road will get you nowhere."
- Henry Kissinger

"The elevator to success is out of order. You'll have to use the stairs... one step at a time."
- Joe Girard

Activity: Formal and Informal Job Training What/How Resource Chart



Instructions:

1. Review the *Phase 3: Formal and Informal Job Training – What/How Resource Chart,* that follows.
2. Think about and write-in additional "**Whats**."
3. Think about and write-in the chart your ideas for "**How**" the supervisor can make this happen.
4. Add any **Resources** or tools that you currently use or know about.
5. What do you really like about your agency's job training program? What could be improved?

Phase 3: Formal and Informal Job Training – What/How Resource Chart

What the supervisor can do	**How the supervisor can do this**	**Resources**
1. Know what training content and assignments are being given to staff. Incorporate training information into the supervisory process	• Help the staff person apply external/formal training to the person's field learning • Tie initial assignment(s) to training	• Agency orientation training list
2. Structure the use of job shadowing to model good practice and de-brief the experience	•	• Job shadowing tool
3. Schedule and hold to regular (weekly) one-on-one supervision sessions	• Use listening and open questions to debrief training and first work assignments	•
4. Get to know the staff person's preferred learning style; apply this knowledge to the training and supervisory process	• Review and monitor training plans to determine what is working and not working and make adjustments	• *Learning Style Inventory* from Hay Resources, see bibliography

Developing a Job Shadowing Approach

As the name implies, job shadowing is a time when one person follows another person, observing what is happening and performing tasks that were agreed upon beforehand. This can be a very effective way to orient a person to a new job or new situation. He/she sees how the job is done through the actions of a role model (more experienced staff). Sometimes a picture is worth a thousand words, so it is with shadowing. Each step in the shadowing process provides opportunity for building team/workgroup trust, respect, motivation, involvement and partnership. Shadowing has the further benefit of allowing experienced staff to show how to do a job when they may not have the time or ability to write it all down. In some instances an experienced staff person's skills may lie in his/her ability to perform well, rather than in being able to reflect on and describe his/her performance.

The job 'shadower' can spend a brief or an extended period of time with the more senior staff member, going out into the field with him/her, observing performance of his/her normal duties. The pair spends time preparing for specific assignments and debriefing afterwards. They would consider questions such as how situations were handled; what background/pre-work was necessary, what has been tried before, what could have been tried, what works, what doesn't, etc.

How to Select the Person to be Shadowed

The first step is to establish the purpose for the specific job shadowing activity and then to pair the new staff with an experienced staff who can demonstrate competencies to be modeled and learned. Most experienced staff in the agency have a particular talent/function that they are known for doing well. Elements to consider in asking an experienced staff to be shadowed are:

- Demonstrated ability to model the desired competencies
- Work content to be observed (such as a home visit) is already planned
- Work schedule and logistics will allow participation in the process
- Willingness to participate and give constructive feedback

Model: The Plan, Do, Check, Act Cycle

Following is a suggested model based on the Plan, Do, Check, Act cycle. The model shows the roles and activities that take place to maximize the effectiveness of job shadowing. The roles of the supervisor, experienced staff and new staff person are discussed. In presenting this model it is assumed that management approves and is supportive of this process.

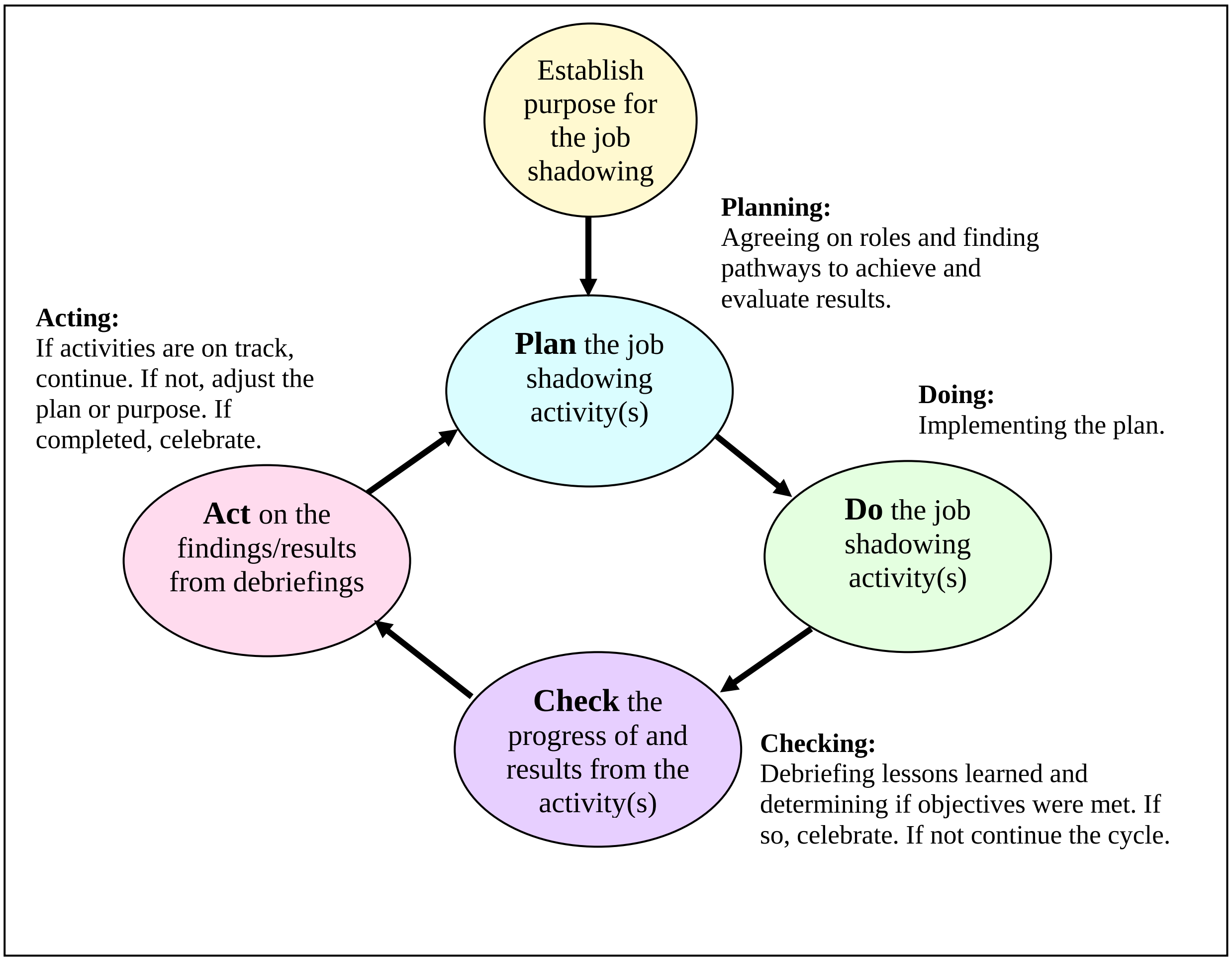


Figure 5.2 The Plan, Do, Check, Act Cycle

Tool: Suggested Job Shadowing Process

	Supervisor (S)	Experienced Staff (E)	New Staff Person (N)
Plan	• Determine what (N) needs to learn from job shadowing • Determine best pairing of (E) and (N) • Establish objectives with (E) and (N) and determine what specific situations, jobs, tasks need to be modeled • Determine what (N) can/should do during the job shadowing experience e.g., observe only, observe and take notes, assist with the completion of paperwork, etc	• Review the expectations with (S) and ask clarifying questions until there is a good understanding of what is expected • Schedule meetings with clients and other activities that are relevant to the job shadowing objectives • Sit down with (N) and review the situation(s) to be shadowed, give (N) the necessary materials he/she needs to review as pre-work e.g., reading case records • Review any field safety issues with (N)	• Receive the assignment • Ask clarifying questions until (N) understands what is expected • Do the pre-work and prepare for the job shadowing experience e.g., read the applicable case records • Develop a list of questions • Meet with the role model to review the questions, when it is convenient for (E) and get to know a little bit about (E) • Review any field safety issues with (E)
Do	• Make a list of questions to be used to debrief (E and N) to determine if the necessary learning has occurred	• After confirming client's permission, conduct the job shadowing • Afterward - be prepared to answer questions from (N)	• Do the job shadowing being careful not to interfere or get in the way of what (E) is doing • Complete whatever specific duties have been assigned e.g., paperwork • Ask questions of (E) afterward to review what happened and why

<table>
<tr>
<td>Check</td>
<td colspan="3">(S), (E), and (N) review the job shadowing objectives and determine what additional work needs to be done. Debrief the following suggested questions as relevant to the assignment:

What agency policies and procedures were applied during this situation?

Support materials e.g., agency handbooks, checklists, relevant articles or professional materials
Paperwork forms/records
Federal or state regulations and/or internal agency policies

Are there specific safety issues to be considered? Personal? Client?
Are there specific child related outcome issues to be considered (safety, permanency, well being)?
What agency values came into play during this interaction?
What are the personality and communication issues?

Was there any special consideration given to how best to communicate with the client? How to deal with client resistance, etc.?
How are diversity issues best dealt with e.g., race, ethnicity, culture, personality types, status within the community, health, etc?

</td>
</tr>
<tr>
<td>Act</td>
<td>Determine what additional job shadowing needs to occur and/or assign cases to (N) to be done independently as appropriate</td>
<td>Continue the process of working with (N) as assigned until objectives have been accomplished</td>
<td>Continue the process of working with (E) as assigned until objectives have been accomplished and/or he/she is working independently</td>
</tr>
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Shadow Boxing

Kyra is starting her second week on the job. Alice is concerned because she hasn't had enough time to spend with her new staff person. Last week was just so hectic. Alice feels like all she did was to put out one fire after another. She knows that Kyra is pretty high energy and Alice gets the feeling that she is getting tired of reading files.

"This week is going to be different" she says to herself, "I'm going to take Kyra out to meet her foster families." Just then Alice gets a call from her supervisor Vivian. There is a consortium meeting that day that Vivian can't attend and she'd like Alice to go in her place.

As Alice hangs up the phone she thinks about Ellen, her most experienced staff person and wonders if she could take Kyra out with her that day. She goes to Ellen's office to ask her about having Kyra shadow her for the day.

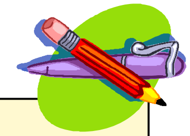
Ellen looks at Alice with exasperation. "Alice, you've got to be kidding me! I've got the Winston termination hearing today and you know that isn't going to be easy. I don't want a new worker getting in the way!" "Besides, can't you pick on someone else? I always seem to be the one that has to break in the new people."

Alice knows that Ellen is right, she does depend on her to help orient the new people, but she just doesn't have another option for today, so she talks Ellen into taking Kyra out with her.

Later that day Alice passes Ellen in the hall. "How did it go with Kyra?" she asks. Ellen gives her an exasperated look and tells her that she is rushing out to a home visit and doesn't have time to talk about it now. As Ellen heads for the door she says over her should: "That girl has got a lot to learn!"

Alice goes to find Kyra who is sitting in her office behind the stack of case files. "You look pretty tired" she says. Kyra just nods her head. Alice pulls up a chair and says "Let's talk about your day."

Activity: Shadow Boxing



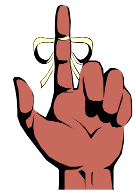
Instructions: read *Shadow Boxing* and respond to the following:

1. At this point in her new job experience, where would you put Kyra in the *Cycle of Positive Change* (see graphic 2 on page 6 of Workbook 5)?

2. Describe the type of experience that Ellen had as the person who was shadowed, and how this experience will impact her relationship with Alice? Her relationship with Kyra?

3. Using the tool *Suggested Job Shadowing Process*, discuss what Alice did well and those areas that she could have improved.

Important points to remember



- Formal and informal job training is vital to getting the new staff person started on the right foot with peers and colleagues.

- Establish a supportive and learning-based supervisory relationship
    - Recognize and appreciate that adults have different learning styles: learn by seeing, learn through hearing/talk and learn through touching/doing
    - Present new training material in ways that meets the needs of all three of these styles

- Formal and informal training such as job shadowing need to be well thought out and structured in advance to gain maximum impact.

- Consider using the Plan, Do, Check, Act Cycle as illustrated in the job shadowing process, as a way to ensure thoroughness
    - **Plan:** Agreeing on roles and finding pathways to achieve and evaluate results.
    - **Do:** Implementing the plan.
    - **Check:** Debriefing lessons learned and determining if objectives were met. If so, celebrate. If not continue the cycle.
    - **Act:** If activities are on track, continue. If not, adjust the plan or purpose. If completed, celebrate.

5.7 Phase 4 – Assuming a Workload

Objectives:

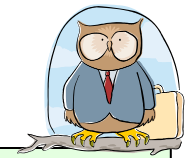
- Provide structured supervision and clear expectations
- Continue training and integrate informal and formal training with assignments
- Help staff cope with significant emotional stressors

What is it?
The assuming a workload phase is a period after the staff person has been hired when the workload is ramping up. The staff person is being given increased responsibility. This is a very critical phase for retention of the new staff person.

How might the new staff feel during this phase?
Figure 5.1 *Cycle of a Positive Change* depicts this phase as a time of "Informed Doubt," where the new staff person is gaining a growing knowledge of the organization and the job. Things can appear quite different than the new staff person's original perception of things. As the realities of the job set in, the new staff person may start to question/second-guess his/her abilities and the decision to take the job. If the pace of getting assignments is too fast, the new staff person may feel overwhelmed with the work and his/her enthusiasm for the job may decrease. The honeymoon is over. The new staff person may feel anxious, frightened and/or disillusioned. Or, on the other end of the spectrum, if the pace of assignments is too slow, he/she may be bored.

At this point the staff person may be wondering:
- Can I do the work here and is it something that is both meaningful to me as well as the agency?
- Do I fit in?
- Can I work with the people here?
- Can I work with the clients?
- Can I connect with the agency's mission?
- Can I connect with this agency's style of management?

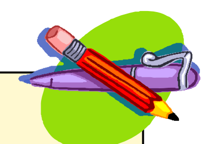
New staff's doubts and possible negativity toward themselves and the job may be expressed openly and/or be hidden. They may be expressed openly in ways such as through complaints about paperwork, complaints about not understanding all the policies and regulations, complaints about having to work with unmotivated birth and/or foster parents and complaints about personal safety on the job. Open complaints such as these can be dealt with. However, a new staff person's doubts may be hidden and come out in unexpected ways. Hidden doubts are much more difficult for supervisors to deal with. They require the supervisor to be proactive to uncover these and to deal with them. Supervisors need to listen and watch for changes in the new staff person's attitudes, body language, etc.



"Great ability develops and reveals itself increasingly with every new assignment."
- Baltasar Gracian

"Never tell people how to do things. Tell them what to do, and they will surprise you with their ingenuity." - Gen. George S. Patton

Activity: Assuming a Workload What/How Resource Chart



Instructions:

1. Review *Phase 4: Assuming a Workload – What/How Resource Chart*, that follows.

2. Think about and write-in additional "**Whats**"

3. Think about and write-in your ideas for "**How**" the supervisor can make this happen.

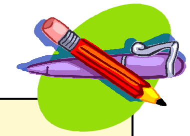
4. Add any **Resources** or tools that you currently use or know about.

Phase 4: Assuming a Workload – What/How Resource Chart

What the supervisor can do	**How the supervisor can do this**	**Resources**
1. Deal with doubt and worker stress Examples of significant emotional stressors include: • First home visit or study • First court appearance • Child injury or disruption • First meeting with birth parents	• Assign senior staff to accompany staff into the field to give feedback and support	•
2. Set clear expectations	• Be sure to reinforce what the staff person is learning in training and assign cases that are in sync with this training • Gain an understanding between the supervisor and staff person as to expectations and priorities for assigned cases	•
3. Personalize supervision by understanding the personality and learning styles of the staff person	• Gain a fuller understanding of the individual staff person's personality & learning style and adapt supervision style/methods to best suit that individual's needs	• *Kolb Style Inventory* • *Myers Briggs Personality Styles* • Workbook 3; *Working with Differences* – Learning style and DISC tools

<u>What</u> the supervisor can do	**<u>How</u> the supervisor can do this**	**Resources**
4. Reinforce agency mission and discuss how to operationalize the mission and values	• Assist the staff person in personalizing the organization's mission to his/ her own values and sense of purpose on the job	• Mission discussion
5. Teach rules of the road	• Intensify help to staff to learn the service protocols and write reports • Provide easy to understand service protocols to cue essential tasks e.g., essentials of home visits, filled out sample forms, process flow charts, etc.	• Create a notebook with sample service plans and protocols

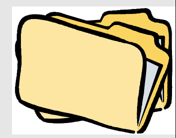
Case Study: Working with Emotional Stressors – Rachel, part 1



Instructions:

As an individual or a small group, read the case study and answer the questions that follow, as if you were Rachel's supervisor.

Working with Emotional Stressors



"Rachel" (part 1)

Rachel has been employed as a residential case manager for three months. She came to the organization straight out of school after completing her MA in Guidance and Counseling. She has finished the orientation phase and has begun to take on some cases of her own. Her supervisor, Jason, is pleased with her progress thus far and feels that she is bright and has a passion for working with the girls on her caseload.

Most recently Rachel has begun working with Grace, a 13-year-old who has been in residential care for the past six months. Grace was placed by her adoptive parents, Mr. and Mrs. Clark, after their prior attempts to find help for her disruptive and increasingly violent behavior failed. Grace made a good adjustment to life on the unit, despite the manipulative behavior noted by the childcare staff. On more than one occasion, Rachel has interceded on Grace's behalf with the unit staff.

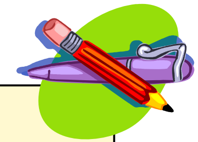
Rachel feels that Grace has responded to her work with her and sees herself as having made real progress. Rachel admits to feeling a certain affinity toward Grace, maybe because Rachel was raised by a stepmother that she never really got along with. Above all, Rachel respects the fact that Grace survived many years in the foster care system and several foster care placements before being placed with the Clarks.

Rachel is not having as much luck with the Clarks. She finds them to be rigid and unwilling to recognize the progress that Grace has made. The Clarks live quite a distance from the residential facility. Rachel feels stressed by their lack of progress and the driving she is required to do to meet with them on a monthly basis. She is aware that the Clarks have missed more then one scheduled visit with Grace.

In a weekly supervision meeting with Jason, Rachel asks for help in working with the Clarks. She tells him that they are uncooperative and she does not believe that they want Grace to be returned to them. She raises questions about what will happen to Grace if the Clarks refuse to work toward reunification.

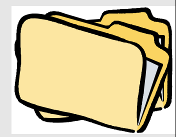
1. What are the possible sources of Rachel’s stress?
2. What questions can you ask to clarify with Rachel what is really going on?
3. How can you support Rachel to develop effective ways to cope with her “informed doubt” and associated stress?
4. How can you help Rachel work with Grace and the Clarks to strengthen the family?

Case Study: Working with Emotional Stressors – Shane, part 1



Instructions:
As an individual or a small group, read the case study and answer the questions that follow.

Working with Emotional Stressors



"Shane" (part 1)

After working for five years as a residential childcare worker, Shane went back to school and got his BSW. Ten weeks ago he was hired by the agency as a foster care worker on Emily's staff. She has been pleased with Shane's performance and level of confidence during the initial orientation phase and she believes that he is ready to take on the responsibility of a workload. Emily has begun to assign Shane new cases in the hopes that he will have a full workload by his six-month evaluation.

Shane is eager to do the work. He enjoys meeting the foster families and children and recently finished his first initial assessment of a birth family. He is good with people and seems committed to providing services in a timely manner. The problem is that Shane is not well organized and he is getting behind in his paper work.

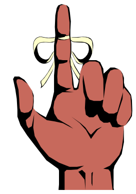
Shane recently completed his first Initial Service Plan (ISP). He spent many hours on it and reported that he took it home to work on it. After Emily reviewed it and made written corrections, she gave it back to him with the request that he rewrite the report, incorporating the changes and corrections that she had made. He seemed crestfallen when he saw all of the red ink on the report, but quickly reworked it and handed it in the next day. Emily noticed that many of the changes that she had made were not incorporated into the report.

When Emily asks Shane to meet with her to discuss the ISP, he arrives without the original report that had all of the corrections she made; and he has to go back to his office to retrieve it. Shane is gone for a long period. When he gets back he only has part of the corrected report. He tells Emily that he's misplaced a few of the pages.

Emily explains to Shane that paper work is a big part of the job and that learning to complete reports on time and in such a way that they meet all of the state, federal and agency guidelines will be an expectation of the job. Shane tells her that he had no idea that there would be so much paper work. He lets her know that he always got good grades on his reports in college and that her expectations for him regarding report writing are too high. Shane says that he's wondering how he will ever be able to get all of the paper work done on time.

1. What are the possible sources of Shane's "informed doubt" and related stress?
2. What questions can Emily ask to clarify with Shane what is really going on?
3. What can Emily do to support Shane to develop ways of balancing the paper work with working with the family?

Important points to remember



- As the realities of the job are setting in with the new staff person and doubts about their ability to do the job develop, supervisors need to be firm and consistent.
- The supervisor needs to continue to set clear expectations, provide structure, address specific learning needs and reinforce the agency mission by translating the mission into meaningful and realistic work assignments.
- New staff need to feel that their "back is covered;" that this is a physically and emotionally safe place to work.
- Open communication is essential during this period.
- New staff's doubts and negativity about the job may be expressed openly where they can be dealt with; or their doubts may be hidden and come out in unexpected ways.
- By being aware of changes in the new staff person's attitudes, body language, and behaviors, the supervisor can encourage constructive dialogue about the person's thoughts and feelings during this period and help normalize their experiences.

5.8 Phase 5 – Increased Assignments

Objective:

- Help the worker manage a larger workload and handle the attendant stress and higher expectations
- Provide intensive supervision while clarifying and holding the line on expectations
- Provide support and encouragement

What is it?

The increased assignments phase is a time when the new staff person is expected to operate more and more on his/her own. He/she has gone through the initial orientation period, has completed the first few assignments and is now expected to do more.

How might the new staff feel during this phase?

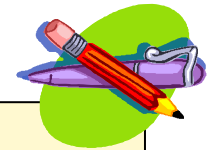
Figure 5.1 *Cycle of a Positive Change* depicts this phase as a time of "Realistic Concern." The new staff person is developing a clear picture of what the work is by now; including what his/her role is and how he/she fits into the organization. The staff person has gained some knowledge of the work and expectations of the job. He/she is starting to understand the organization's policies and procedures but still has to think about what he/she is doing (knowing what to do and how to do it, doesn't come automatically yet). The staff person may become negative and have increasing doubt about the job. He/she may ask:

- How am I going to do all the paper work and still find time to meet the needs of the clients?
- Am I cut out for this work? Can I make a contribution here?
- Is it physically and emotionally safe to work here?
- Can I get personal satisfaction from this work and have fun on the job?
- Is this the right job fit for me?

Supervisors can work to support and motivate the new staff person by:

- Working to build a climate of trust within the workgroup
- Providing structure and clear expectations regarding the work to be done
- Helping staff make their own decisions
- Helping staff manage stress
- Helping staff master the basic legal and technical requirements of the job

Activity: Increased Assignments What/How Resource Chart



Instructions:

1. Review *Phase 5: Increased Assignments – What/How Resource Chart*, that follows.

2. Think about and write in additional "**Whats**."

3. Think about and write in your ideas for "**How**" the supervisor can make this happen.

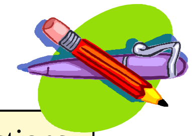
4. Add any "**Resources**" or tools that you currently use or know about.

Phase 5: Increased Assignments – What/How Resource Chart

<u>What</u> the supervisor can do	**<u>How</u> the supervisor can do this**	**Resources**
1. Build trust within your workgroup	• Model and help staff develop effective communication and relationship skills • Establish a culture where it is supportive and safe to talk about experiences and feelings openly	•
2. Provide structure and clear expectations regarding the work to be done	• Hold the line on work expectations while giving support and encouragement • Pace workload assignments, based on the individual's readiness • Regularly review cases with new staff to maximize learning	•
3. Help staff make their own decisions	• Actively listen – ask clarifying and open questions • Lead staff to make informed decisions	• Problem solving models
4. Help staff manage stress	• Talk about stress and make a distinction between stress and distress • Encourage ways of dealing with distress such as exercise, open communication with colleagues about the situation, celebration of achievements, etc.	• Stress and time management training

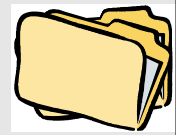
<u>What</u> the supervisor can do	**<u>How</u> the supervisor can do this**	**Resources**
5. Help staff master the basic legal and technical requirements of the job	• Teach staff to properly organize information and write an Initial Service Plan (ISP)	• Sample ISP's
6. Ensure physical safety at all times	•	• Safety training and policies
7. Help staff understand and use agency and community resources on behalf of clients	• Have current resource directories available in the unit • Have cross-functional meetings to share information and internal resources	•

Case Study: Working with Hidden and Open Reactions to Stress – Rachel, part 2



Instruction: As an individual or a small group, read the case study and answer the questions that follow.

Working with Hidden and Open Reactions to Stress



“Rachel” (part 2)

Rachel has now been on Jason’s team for six months. She is making good progress and appears to be fitting in well with the other residential case managers in the unit. She is eager to do the work and will ask questions of Jason and her co-workers when she is unclear or needs more information. The residents on the unit respond well to her and for the most part, she is doing well in her work with families.

Rachel continues to work with Grace and her adoptive family, the Clarks. The decision has been made to work toward discharging Grace within the next three months. Rachel reports that the Clark’s are not willing to talk about Grace coming home in such a short period of time. Rachel has confided to her office mate about her feelings regarding the Clarks. “Mrs. Clark is an impossible woman,” she says. “She doesn’t care about Grace at all and she tries to get her husband to feel the same way.”

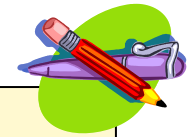
Jason has asked Rachel to staff Grace’s case at the next case manager’s meeting. Rachel spends a great deal of time talking about the progress that Grace has made since she has been in residential care. She lets the team know that she has made real progress with her and that she thinks that she and Grace have formed a trusting relationship.

When the team asks questions about the Clarks, Rachel seems evasive and doesn’t provide much information. She tells the team that the Clarks are resistant to working with her. When team members press her with more direct questions about the Clarks involvement in their daughter’s treatment, Rachel tells them that she is suspicious about their motivation to adopt Grace in the first place. She tells staff that she has not seen the Clarks on a regular basis as they have missed appointments with her and she has had difficulty finding the time to complete home visits due to the long distance she must travel to get to their home.

After the meeting, Jason asks Rachel to come into his office where he confronts her about the missed appointments with the Clarks. As Rachel begins to discuss her work with the family, it becomes clear to Jason that Rachel has not followed through with the Clarks and has cancelled several appointments with them. Jason becomes impatient with Rachel’s handling of the case and asks her directly why she has cancelled appointments with the Clarks. Rachel responds by saying that Mrs. Clark, in particular, is very difficult to deal with, as she is extremely angry with Grace. She tells Jason that Grace does not want to return to her family. Rachel looks at Jason and says, “I don’t see the point in trying to reunite Grace with the Clarks when they don’t want her and she doesn’t want to live with them anymore.”

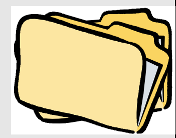
1. What are the reactions to stress that Rachel is displaying regarding working with Grace and her family? Which of these reactions would you characterize as open? As hidden?
2. How can Jason give Rachel the support she needs, while holding the line on expectations?
3. How can Jason help Rachel become more goal-oriented to achieve family reunification?

Case Study: Working with Hidden and Open Reactions to Stress – Shane, part 2



Instruction:
As an individual or a small group, read the case study and answer the questions that follow.

Working with Hidden and Open Reactions to Stress



“Shane” (part 2)

Shane has now been under Emily’s supervision for six months. He continues to have enthusiasm for the job, especially the direct work with clients. The children and foster families on his workload seem to respond well to him. He has been eager to assume a full workload and he brings much strength to the job including his willingness to pitch in when team members need assistance.

Paper work is another story, as Shane continues to have difficulties in this area. He is consistently late turning in his Updated Service Plans (USP’s) and court reports and procrastinates in making the changes Emily requests. He confided to a coworker recently that every time he gets a report back from Emily, he looks at all the corrections and feels like he’s being handed back a term paper with a failing grade. “Just once,” he says, “I’d like to get a report back that isn’t bleeding in red ink!”

Earlier this week Emily gave Shane back his Individualized Service Plans (ISP’s) on the Garcia sibs. As usual the reports were covered in corrections and had sticky notes attached with requests for additional information. Emily let Shane know that the reports would need to be corrected and given back to her by Friday. Shane waited until Friday at 4:30pm to turn in the reports. When Emily got them she realized that Shane had not completed all of the corrections she asked him to complete. Emily reviewed the reports and put them on Shane’s desk with a note that says: “Please see me ASAP.”

On Monday Shane waits until the afternoon to come into Emily’s office. He is standing in the doorway with the reports rolled up in his hand. Emily asks him to sit down, but Shane only takes a few steps into the office and stands shifting his weight from one foot to another. Emily lets Shane know that she is concerned about the fact that his paperwork is consistently late and that when she gives reports back to him, he is not making the requested corrections in a timely manner.

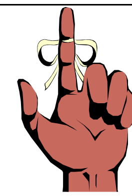
Shane tells Emily that the paper work makes him nuts, and that writing ISP’s, USP’s and court reports are a waste of time. He says they are just “bureaucratic bull” and that the repetition required in the reports drives him crazy. He tells Emily that none of the reports accurately depicts what is going on with the kids and that the time they take to write takes him away from doing real work with kids and families. Finally he says: “What do you want me to do, write reports or put out fires?”

1. What are the reactions to stress that Shane is displaying regarding writing reports? Which of these reactions would you characterize as open? As hidden?

2. How can Emily give Shane the support he needs, while holding the line on expectations?

3. How can Emily communicate her expectations to Shane? What changes does she need to be looking for in his behavior and performance?

Important points to remember



- This phase of *Realistic Concern* is a time when the new staff person is developing a clear picture of what the work is, what his/her role is and how he/she fits into the organization.

- During this phase supervisors can work to motivate new staff by:
    - Working to build a climate of trust within your workgroup
    - Providing structure and clear expectations regarding the work to be done
    - Helping staff make their own decisions
    - Helping staff manage stress
    - Helping staff master the basic legal and technical requirements of the job

5.9 Phase 6 – Normal/Full Workload

Objective:

- Help the staff person feel like a respected, competent member of the workgroup as well as a valued contributor to the mission of the organization.
- Continue to mentor personal and career development
- Help the staff person answer whether child and family service is a good career fit and what it will take to keep him/her in the organization

What is it?
The normal/full workload phase is when the workload is brought up to full capacity. The supervisor and staff person will have established a working relationship and more autonomy can be given as the staff person is ready.

How might the new staff feel during this phase?
Figure 5.1 *Cycle of a Positive Change* depicts this phase as a time of *Informed Certainty* where the Staff person has increased knowledge of the organization and the job. He/she may ask him/herself:

- Am I an accepted member of a workgroup and do they value my contributions?
- Can I identify with child and family service as a potential long-term career?
- Can I personalize and identify with this organization (mission, people, clients and systems)?
- How can I get meaning and satisfaction from this work with so much administrative paperwork?

Supervisors can work to support and motivate the new staff person by:

- Providing regular performance feedback to acknowledge progress, reward achievement and deal constructively with both positive and challenging issues
- Providing the necessary training and other resources needed to balance paperwork, casework and other duties of the job
- Setting expectations & objectives and reviewing them with staff regularly
- Providing job enrichment opportunities for staff
- Providing support and additional resources for removing barriers such as completing paperwork

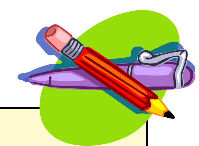
"Motivation is the art of getting people to do what you want them to do because they want to do it."

- Dwight D Eisenhower

"People often say that motivation doesn't last. Well, neither does bathing -- that's why we recommend it daily."

- Zig Ziglar

Activity: Normal Full Workload What/How Resource Chart



Instructions:

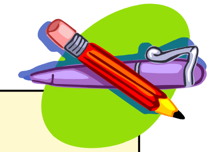
1. Review *Phase 6: Normal Full Workload – What/How Resource Chart*, that follows.
2. Think about and write-in additional "**Whats**."
3. Think about and write-in your ideas for "**How**" the supervisor can make this happen.
4. Add any **Resources** or tools that you currently use or know about.

Phase 6: Normal Full Workload – What/How Resource Chart

What the supervisor can do	**How the supervisor can do this**	**Resources**
1. Provide regular and motivating performance feedback	• Help the staff person assess his/her talents and match assignment to talents • Help the staff person identify and connect with additional learning opportunities that are suited to his/her level of development and individualized training needs • Help the staff person assess his/her goodness of fit with the organization's needs and develop retention plans • Learn how staff like to receive feedback	• Supervisory log
2. Provide the necessary training and other resources needed to balance paperwork and casework	• Provide time management skill training	• *First Things First* by Stephen Covey • *Seven Habits of Highly Effective People* by Stephen Covey
3. Set expectations and objectives, review them with staff regularly	•	•

<u>What</u> the supervisor can do	**<u>How</u> the supervisor can do this**	**Resources**
4. Provide job enrichment opportunities for staff	•	•
5. Provide support and additional resources for completing paperwork		

Activity: Setting Performance Objectives



Instruction:

1. As an individual or a group, read the *Model for Setting S-M-A-R-T Performance Objectives*, that follows.

2. Fill out the *Tool: Sample Performance Agreement Form* that follows as though you were doing it with either Rachel or Shane.

Model for Setting S-M-A-R-T Performance Objectives

It is important that staff have regular one-on-one meetings with their supervisor to review and set their performance objectives. This is also a time when the agency priorities and the new staff person's priorities can be discussed. The supervisor needs to keep in mind that a big part of staff job satisfaction comes from having and meeting clear expectations.

Things may be going along just fine and there may only be a few areas where the new staff person could use a bit of clarification. Perhaps he/she would like to get some direction on how to polish up a particular skill. Perhaps there has been a misunderstanding of what or how the job should be done. Or perhaps there are more fundamental areas to work on. Objectives need to be discussed and established for both:

- Job specific work to be done such as taking on additional or different types of workloads
- Personal skills/knowledge improvement i.e., areas that the supervisor and/or staff person see that require personal learning and growth.

When writing objectives, be sure that they pass the **S-M-A-R-T** test. To test both the merit and completeness of the objectives ask the following five questions:

Specific – Are the objectives to be achieved specific/precise enough? Objectives must be developed to result in observable actions, behaviors or achievements linked to a rate, number, percentage or frequency. For example "answer the phone quickly" can be said to be a precise description of behavior. However, if the objective is stated as "answer the phone within three rings" a rate has been added and the behavior is now much more specific.

Measurable – Are the objectives quantifiable in terms of quantity, quality and/or time? If the answer is yes, you can put into place a reliable system to measure progress towards the achievement of the objective.

Achievable – Are you attempting too much? Be realistic and insure that the objective(s) can be achieved with a reasonable amount of effort. Do you have the resources to make the objective(s) happen (people, money, time, equipment, knowledge, etc.)? Is it possible to achieve the objective(s) or is it based on fantasy?

Relevant – Does the objective(s) address one of the major elements of the job? Does it relate to the strategic outcomes of the agency? Does it help the worker relate his/her work to the agency's mission?

Time bound – Have time limits been set? State when the objective(s) will be achieved e.g., within a month, within the next six months.

A performance agreement can be used as an ongoing planning tool for all staff at all phases of development. It is not recommended for use as a corrective or punitive action. It is not meant to replace the agency's formal performance review system.

Tool: Sample Performance Agreement Form [4]

Employee: ________________________________ Date: ____ / ____ / ____

Supervisor: _________________________ Position: _______________________________

Within the period ____________________ , the following will be accomplished:

A. Key result area: _____Service to clients_____

Objectives:

1. ____

   ____

2. ____

   ____

B. Key result area:_____Paperwork and administration_____

Objectives:

1. ____

   ____

2. ____

   ____

C. Key result area:_____Personal care and learning_____

Objectives:

1. ____

   ____

2. ____

   ____

I understand that achieving these objectives is important to me and to the agency. Progress toward these objectives will be reviewed at regularly scheduled supervisory meetings.

Employee _________________________ Supervisor _________________________

[4] The Performance Agreement form has been adapted from *Keeping the People Who Keep You in Business* by L. Branham

Tool: Discussing Career Concerns [5]

One of the key factors in staff retention is to understand what is important and what it takes to motivate an individual staff person. Once an individual's motivation is understood, a supervisor can build strategies to reinforce motivation. It is important to ask each individual staff what is important to her/him and ask what it will take to retain her/him as an employee with your agency. Sometimes a person does not know how to answer that question. The following tool may be helpful as a starting point for this discussion.

Rank your top five career concerns on the list below in order of importance with 1 being your greatest concern and 5 being lower concerns.

Career concern	**Priority**
1. Improving performance in current job	
2. Getting more training in current job	
3. Reaching educational goals	
4. Learning more about career options	
5. Taking stock of abilities, interests and values	
6. Learning more about possible career paths	
7. Exploring different jobs or assignments	
8. Preparing for promotions or advancement	
9. Having a better work and personal life balance	
10. Other	
11. Other	
12. Other	

---

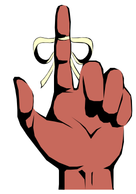
[5] Adapted from Leigh Branham *Keeping the People Who Keep You in Business*, 2001 AMACOM American Management Association, New York, NY.

A Final Word About Retaining Good Staff

Supervisors can:

- Ask staff what it will take to retain them
- Let staff know that they are valued as individuals
- Tailor staff assignments to individual interests (as much a possible)
- Connect staff to career development opportunities

Important points to remember



- This phase of assuming a full, normal workload is a time of *Informed Certainty* where the staff person has increased knowledge of the organization and the job.

- During this phase, supervisors can work to support and motivate the new staff person by:
    - Providing regular performance feedback to acknowledge progress, reward achievement and deal constructively with both positive and negative issues
    - Providing the necessary training and other resources needed to balance paperwork, casework and other duties of the job
    - Setting expectations & objectives and reviewing them with staff regularly
    - Providing job enrichment opportunities for staff
    - Providing support and additional resources for removing barriers such as completing paperwork
    - Understanding what motivates each individual and then developing specific strategies to reinforce motivation

- When writing objectives be sure that they pass the **S-M-A-R-T** test. That objectives are:
    - Specific
    - Measurable
    - Achievable
    - Relevant
    - Time bound

- Supervisors play a significant role in staff retention.

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Appendix

Focus of Supervision - The First Six Months, sample of a partially completed form

Phase	1 Hiring & Selection	2 Initial Orientation	3 Formal and Informal Job Training	4 Assuming a Workload	5 Increased Assignments up to Full Workload	6 Normal/Full Workload
New staff person's feelings and reactions	**Mutual Exploration** Searching & hopeful	**Uninformed Certainty** Initial enthusiasm & confidence	**Uninformed Certainty** Eager to learn and be accepted	**Informed Doubt** Questioning fit, lowered confidence, reacting to stress in open and hidden ways	**Realistic Concerns** Beginning to understand the responsibility; may be overwhelmed but hopeful	**Informed Certainty** Mentally and emotionally committed (or not) to the job
Focus of supervision	Hire the right new staff - resilient and productive staff	Welcome and teach new staff how to navigate the organization Help to understand basic job expectations tied to agency's mission	Get new staff started on the right foot with peers Establish the supervisor relationship & schedule Begin appropriate level of formal and informal training	Provide supervisory structure, feedback and mentoring. Continue training and integrate with field assignments	Help the worker manage the emotions, stress and higher expectations of the increasing workload	Assist transition to being a full contributing workgroup member and carrier of agency's mission. Continue to mentor personal and career development

Significant Emotional Events by Staff Function, sample

Foster Care Caseworker	Adoption Caseworker	Protective Service Caseworker	Residential Care Staff
Learning rules and regulations	Learning rules and regulations of adoption	Learning policy and procedures	Learning rules and regulations
Initial Foster Home Visits	Assessing children for adoption	Understand the computer systems	Learning to do the extensive paper work
Learning to do paper work; writing reports	Assessing families for adoption	Learning to do paper work and write petitions	Establishing relationships with the residential care staff
Determining foster care rates	Determining subsidy rates	Conducting investigations and forensic interviews	Providing direct services to children
Initial birth family home assessments	Competing family adoptions	Dealing with issues of personal safety	Working with the families of the children in care
Initial encounter with the court system	Moving children into adoptive families	Testifying in court	Working with the court system
Moving a child in foster care	Disruptions and moving children out of families	Learning time management skills	Balancing the varied work load
Termination of parental rights	Post placement work with families	Building a community resource directory	Finding and utilizing community resources
Reunification with birth family	Search work with adult adoptees	Dealing with secondary trauma	Seeing children who have been discharged come back into the system
Death or serious injury of a child		Learning to work as part of the work and community team	

Tool: Profile/Evaluation Form - Blank

Candidate's name and contact information:						
Position applying for:						
KEY KNOWLEDGE AND TECHNICAL SKILLS		**Low**				**High**
1.		1	2	3	4	5
2.		1	2	3	4	5
3.		1	2	3	4	5
4.		1	2	3	4	5
5.		1	2	3	4	5
SOCIAL, COMMUNICATION AND COLLABORATIVE SKILLS						
6.		1	2	3	4	5
7.		1	2	3	4	5
8.		1	2	3	4	5
9.		1	2	3	4	5
10.		1	2	3	4	5

SELF-AWARENESS and SELF-MANAGEMENT		Low				High
11.		1	2	3	4	5
12.		1	2	3	4	5
13.		1	2	3	4	5
14.		1	2	3	4	5
15.		1	2	3	4	5
KEY MOTIVATORS						
16.		1	2	3	4	5
17.		1	2	3	4	5
18.		1	2	3	4	5
19.		1	2	3	4	5
20.						
OTHER						
21.		1	2	3	4	5
22.		1	2	3	4	5
23.		1	2	3	4	5
Interviewer's signature:		Date:				

Tool: Candidate Profile/Evaluation Form - Entry Level Child And Family Service Worker [6]

Candidate's name and contact information:						
Position applying for: *Entry Level Child and family service Worker*						
KEY KNOWLEDGE AND TECHNICAL SKILLS		**Low**				**High**
1.		1	2	3	4	5
2.		1	2	3	4	5
3.		1	2	3	4	5
4.		1	2	3	4	5
SOCIAL, COMMUNICATION AND COLLABORATIVE SKILLS						
5.	Ability to read situations and adapt behaviors accordingly	1	2	3	4	5
6.	Ability to project trustworthiness, confidence and respect	1	2	3	4	5
7.	Teamwork – ability to collaborate and work effectively with others	1	2	3	4	5
8.	Ability to write clearly	1	2	3	4	5
9.	Ability to express ideas clearly, use language that is appropriate to the situation, explain concepts and persuade others	1	2	3	4	5
10.	Displays good listening skills, gives appropriate responses and is empathic toward others	1	2	3	4	5
11.		1	2	3	4	5
12.		1	2	3	4	5

[6] The Candidate Profile form has been adapted from *Keeping the People Who Keep You in Business* by L. Branham

SELF-AWARENESS and SELF-MANAGEMENT		Low				High
13.	Ability to be open and honest with self and others and take responsibility for his/her own decisions and actions	1	2	3	4	5
14.	Openness to learning about diversity and the impact of personal bias on decision making and interaction with others	1	2	3	4	5
15.	Ability to manage time, schedule and set priorities	1	2	3	4	5
16.	Displays personal and professional ethics in all that he/she does	1	2	3	4	5
17.	Ability to tolerate ambiguity, risk and make difficult decisions	1	2	3	4	5
18.	Ability to maintain balance between work and personal life	1	2	3	4	5
19.	Ability to manage stress	1	2	3	4	5
KEY MOTIVATORS						
20.	Demonstrates some experience with and has a strong personal commitment for working with families and children at risk	1	2	3	4	5
21.	Commitment and sensitivity to the families and children the agency serves	1	2	3	4	5
22.	Commitment to achieving timely outcomes in a timely manner	1	2	3	4	5
23.	Understands that child and family service is a family centered service and is motivated to work with and through families to achieve outcomes for kids	1	2	3	4	5
24.						
25.		1	2	3	4	5
OTHER						
26.		1	2	3	4	5
27.		1	2	3	4	5
28.		1	2	3	4	5
29.						
Interviewer's signature:		Date:				

Tool: Checklist for Supervisors during New Staff Orientation Week

Do – Prior to First Day

- ❑ Provide key written material, such an employee handbook and other relevant information
- ❑ Arrange for office furnishings, equipment and essential supplies to be in place prior to the arrival of the new staff
- ❑ Consider taking the new person to lunch on or prior to the first day on the job
- ❑ Plan how you want the person to spend their first day
- ❑ Arrange for person-to-person meetings with one or more of your team
- ❑ Make sure to let all staff know when the new staff is expected and ask them to make her/him feel welcome
- ❑ Consider having a welcoming party, breakfast, potluck lunch, etc.
- ❑ Pair up the new staff person with a respected co-worker "buddy" for the first month to help them learn the ropes and to ask such questions as: How are you? How is it going? Do you need any help?
- ❑ Schedule group orientations in the afternoon, so that the new staff has time to settle in and meet one-on-one with their new supervisor
- ❑ Put some basic orientation on CD or website so the staff person can access and review information when needed

Do – First Day

- ❑ Meet with the staff person early in the first day to:
  - o Reaffirm the importance of the staff person's job to the agency's mission
  - o Review job expectations
  - o Set expectations and schedule for the first week, including at least two additional supervisory sessions, one mid week and the other at the end of the first week
- ❑ Provide an orientation checklist that will enable the staff person to take charge of her/his own orientation
- ❑ Introduce the staff person to as many team members and key agency staff as possible and let them form their own opinions of people
- ❑ Have someone show the person around the facility and make sure they know who to go to for what

Do – First Week

- ❑ Make sure the new person is oriented to the computer, fax machine, copy machine, phone system, where to get supplies, etc.
- ❑ Introduce the staff person in a group meeting with enthusiasm and use the time to re-introduce group members and their specialties, interests, etc.
- ❑ Encourage the person to meet with co-workers throughout the first week to get their perspectives on things
- ❑ Give appropriate and challenging assignments in the first week and the first month
- ❑ Schedule the person for relevant in-house and external training and prepare him/her for what he/she should be getting out of training
- ❑ Hold an end of the week meeting with the staff person to set objectives for the first month on the job and review the organization's mission

Tool: Activities for Inspiring Commitment to the Agency's Mission and Values

Mission in the Woodwork

Inspiring commitment to the agency's mission and values starts on day one, but it is not a one-time event. The importance of the agency's mission and values must be reinforced in supervisory sessions and team meetings on an ongoing basis. You know you have been successful in inspiring commitment to mission when others talk about it often and when questions are raised in supervision and staff meetings about management or staff actions that are incongruent with the agency's mission and values.

First Meeting with New Staff

The supervisor discusses the objectives of the agency's orientation program and prepares the staff person for the orientation week. Mission and values of the organization are discussed and the new staff person is provided with a copy.

Introducing New Employees to Other Staff

Ask your employee how she/he wants to be introduced to colleagues and what experiences she/he wants highlighted. When introducing other staff, highlight the person's tenure with the organization and personal contributions.

A Possible Homework Assignment for New Staff

The supervisor informs the new staff person that at the end of the week, he/she will be asked to describe the agency's mission and values from their impressions of their first week on the job. He/she is also asked, at the end of their first week, to set goals for his/her first month on the job.

The supervisor encourages the new staff person to interview other staff about the work of the agency and its mission. Some possible questions a new staff person might ask include:

- What is it about our agency that most attracted you and keeps you here?
- When do you feel that you are most connected to the agency's mission and values?
- What have you learned about the children and families on your workload?
- What barriers get in the way of achieving your goals?
- Who do you seek out to answer specific questions and get help when you need it?

Orientation De-Briefing Meeting with New Staff Person

At the end of the first week, or soon thereafter, the supervisor meets with the new staff person and asks him/her to debrief the week with them. Some questions might include:

- What was most helpful in your orientation?
- What was least helpful?
- What other questions do you have?

Goals Discussion
The supervisor will engage the staff person in setting goals for her/his first month of employment. Some possible questions to ask may be:
- What are your learning goals for the next month?
- How can I help you reach your goals?
- What might stand in your way of reaching your goals?

The supervisor will also explain his/her expectations for the first month and suggest plans relating to the following areas:
- Formal and informal training
- Work assignments
- Job shadowing

The supervisor will set a regular (weekly) schedule of supervisory sessions and stresses the importance of maintaining the schedule

Retention Discussion
The supervisor will reinforce how important committed staff are to the agency and how he/she wants to do everything possible to encourage the staff person to stay and grow with the organization. The supervisor may then:
- Ask the staff person about what will be important to him/her personally in making the decision to stay with the agency
- Ask the new staff person to promise that he/she will come and talk with the supervisor when he/she encounters difficulties and before considering leaving the agency

Tool: Suggested Job Shadowing Process

	Supervisor (S)	Experienced Staff (E)	New Staff Person (N)
Plan	• Determine what (N) needs to learn from job shadowing • Determine best pairing of (E) and (N) • Establish objectives with (E) and (N) and determine what specific situations, jobs, tasks need to be modeled • Determine what (N) can/should do during the job shadowing experience e.g., observe only, observe and take notes, assist with the completion of paperwork, etc	• Review the expectations with (S) and ask clarifying questions until there is a good understanding of what is expected • Schedule meetings with clients and other activities that are relevant to the job shadowing objectives • Sit down with (N) and review the situation(s) to be shadowed, give (N) the necessary materials he/she needs to review as pre-work e.g., reading case records • Review any field safety issues with (N)	• Receive the assignment • Ask clarifying questions until (N) understands what is expected • Do the pre-work and prepare for the job shadowing experience e.g., read the applicable case records • Develop a list of questions • Meet with the role model to review the questions, when it is convenient for (E) and get to know a little bit about (E) • Review any field safety issues with (E)
Do	• Make a list of questions to be used to debrief (E and N) to determine if the necessary learning has occurred	• After confirming client's permission, conduct the job shadowing • Afterward - be prepared to answer questions from (N)	• Do the job shadowing being careful not to interfere or get in the way of what (E) is doing • Complete whatever specific duties have been assigned e.g., paperwork • Ask questions of (E) afterward to review what happened and why

<table>
<tr>
<td>Check</td>
<td colspan="3">(S), (E), and (N) review the job shadowing objectives and determine what additional work needs to be done. Debrief the following suggested questions as relevant to the assignment:
• What agency policies and procedures were applied during this situation?
o Support materials e.g., agency handbooks, checklists, relevant articles or professional materials
o Paperwork forms/records
o Federal or state regulations and/or internal agency policies
• Are there specific safety issues to be considered? Personal? Client?
• Are there specific child related outcome issues to be considered (safety, permanency, well being)?
• What agency values came into play during this interaction?
• What are the personality and communication issues?
o Was there any special consideration given to how best to communicate with the client? How to deal with client resistance, etc.?
o How are diversity issues best dealt with e.g., race, ethnicity, culture, personality types, status within the community, health, etc?</td>
</tr>
<tr>
<td>Act</td>
<td>• Determine what additional job shadowing needs to occur and/or assign cases to (N) to be done independently as appropriate</td>
<td>• Continue the process of working with (N) as assigned until objectives have been accomplished</td>
<td>• Continue the process of working with (E) as assigned until objectives have been accomplished and/or he/she is working independently</td>
</tr>
</table>

Setting Performance Objectives

It is important that staff have regular one-on-one meetings with their supervisor to review and set their performance objectives. This is also a time when the agency priorities and the new staff person’s priorities can be discussed. The supervisor needs to keep in mind that a big part of staff job satisfaction comes from having and meeting clear expectations.

Things may be going along just fine and there may only be a few areas were the new staff person could use a bit of clarification. Perhaps he/she would like to get some direction on how to polish up a particular skill. Perhaps there has been a misunderstanding of what or how the job should be done. Or perhaps there are more fundamental areas to work on. Objectives need to be discussed and established for both:

- Job specific work to be done such as taking on additional or different types of workloads
- Personal skills/knowledge improvement i.e., areas that the supervisor and/or staff person see that require personal learning and growth.

When writing objectives be sure that they pass the **S-M-A-R-T** test. To test both the merit and completeness of the objectives ask the following five questions:

> **Specific –** Are the objectives to be achieved specific/precise enough? Objectives must be developed to result in observable actions, behaviors or achievements linked to a rate, number, percentage or frequency. For example 'Answer the phone quickly' can be said to be a precise description of behavior, you can clearly see whether someone answers the phone or not, but there is no rate, number, percentage or frequency linked to it. However, if the objective is stated as ‘Answer the phone within 3 rings' a rate has been added and the behavior is now much more specific.
>
> **Measurable –** Are the objectives quantifiable in terms of quantity, quality and/or time? If the answer is yes, you can put into place a reliable system to measure progress towards the achievement of the objective.
>
> **Achievable –** Are you attempting too much? Be realistic and insure that the objective can be achieved with a reasonable amount of effort.
>
> **Realistic –** Do you have the resources to make the objective happen (people, money, time, equipment, knowledge)? It is possible to achieve the objective or is it based on fantasy?
>
> **Time bound –** Have time limits been set? State when you will achieve the objective e.g., within a month; within six months.

A performance agreement should be used as an ongoing planning tool for all staff at all phases of development. It is not recommended for use as a corrective or punitive action. It is not meant to replace the agency’s formal performance review system.

Tool: Sample Performance Agreement Form [7]

Employee: ________________________________ Date: ____ / ____ / ____

Supervisor: _________________________ Position: _______________________________

Within the period ____________________ , the following will be accomplished:

A. Key result area: Service to clients

Objectives:

1. ____

____

2. ____

____

B. Key result area: Paperwork and administration

Objectives:

1. ____

____

2. ____

____

C. Key result area: Personal care and learning

Objectives:

1. ____

____

2. ____

____

I understand that achieving these objectives is important to me and to the agency. Progress toward these objectives will be reviewed at regularly scheduled supervisory meetings.

Employee _________________________ Supervisor _________________________

[7] The Performance Agreement form has been adapted from *Keeping the People Who Keep You in Business* by L. Branham

Tool: Discussing Career Concerns [8]

One of the key factors in staff retention is to understand what is important and what it takes to motivate an individual staff person. Once an individual's motivation is understood, a supervisor can build strategies to reinforce motivation. It is important to ask each individual staff what is important to her/him and ask what it will take to retain her/him as an employee with your agency. Sometimes a person does not know how to answer that question. The following tool may be helpful as a starting point for this discussion.

Rank your top five career concerns on the list below in order of importance with 1 being your greatest concern and 5 being lower concerns.

Career concern	**Priority**
1. Improving performance in current job	
2. Getting more training in current job	
3. Reaching educational goals	
4. Learning more about career options	
5. Taking stock of abilities, interests and values	
6. Learning more about possible career paths	
7. Exploring different jobs or assignments	
8. Preparing for promotions or advancement	
9. Having a better work and personal life balance	
10. Other	
11. Other	
12. Other	

[8] Adapted from Leigh Branham *Keeping the People Who Keep You in Business*, 2001 AMACOM American Management Association, New York, NY.

About the Authors

John and Judith McKenzie, along with their colleague, Rosemary Jackson, are the principal authors, organizational consultants and trainers for the Michigan State University Workbook Series on *Staff Retention in Child and Family Services*. Their results-oriented work ethic, combined expertise, and successful work histories are ideally suited to assisting child and family service agencies in developing a culture for staff satisfaction and retention.

Judith was the CEO and President of Spaulding for Children for 22 years. Under her leadership, Spaulding grew from a small special needs adoption program to a renowned multi-service agency that has been the National Resource Center for Special Needs Adoption continuously since 1985. In addition, she has several years experience administering public child and family service programs, including public assistance, protective services, foster care and adoption and child welfare agency licensing. Judith has provided training, keynote addresses, and has written extensively on child and family services, public and non-profit agency management and strategic planning. Judith received her MSW from the University of Michigan.

John has been a "hands on" manager and organizational consultant in business and industry for over 25 years. He has led a number of change initiatives and implemented many new projects throughout his career, winning six executive level awards for his contributions to General Motors, TRW and Unisys. John has experience and proven expertise in strategic planning, change management, teambuilding, project management, and implementation of workforce and quality processes. He has adapted these proven methods and materials from business to provide assistance to state child welfare programs and non-profit agencies. John received his BS in Industrial Engineering from the University of Maryland.

John and Judith have provided consultation and training in strategic planning and change management for over fifteen states' child welfare programs. In addition, they have written a series of five, *Answering the Call*, publications for AdoptUsKids on recruitment and retention of foster and adoptive parents, which have been published and distributed to over 60,000 individuals and agencies nationwide.

Rosemary Jackson is an accomplished trainer, consultant, program developer and clinician. Rosemary has developed curriculum for clinicians and parents to address the post placement needs of foster and adoptive families and she currently offers post adoption services to adult adoptees and families who have adopted internationally. She has also developed training materials on a variety of topics including grief and loss; workplace stress and burnout; secondary trauma and others that are germane to staff offering services to children and families. Her years combining service delivery and product development make her uniquely qualified to offer training and consultation services in child and family services.

Project Services

With a flexible design, agency leaders, supervisors and front-line staff will be able to benefit from using the curriculum in many ways. However, it is important for users to understand that the curriculum, at its best, is intended to facilitate cultural change within agencies to support staff retention and job satisfaction and improve agency outcomes. Therefore, states and agencies that make a commitment to obtain professional services to facilitate the implementation of the curriculum will experience better and more lasting results. The various ways the curriculum can be accessed and used are described below.

Self-study - Specific workbooks target the needs and interests of agency leaders, supervisors and front-line workers. Workbooks include learning activities, case studies and tools to enhance individual learning.

Workshops - Trainers and advisors are available to conduct workshops for leaders, program managers and/or supervisors. These workshops are tailored to the specific audience and (when available) will include use of media to present learning principles, engage participants in small group learning activities and demonstrate how the program can be used in the work setting.

Training of facilitators - Project staff will provide facilitator training for individuals or agency teams. Sessions will equip teams to facilitate learning groups in an agency and to use the curriculum in a combination of self-study and small group activities.

Multiple agency user group(s) - Project staff will provide ongoing training and support to a regular group of selected and trained agency facilitator teams, who will form a User's Group. The advantage to this model is that teams will be supported and encouraged to share their promising practices.

Single agency model - An experienced project faculty team will facilitate an agency's development plan over a mutually agreed upon period of time. Services will involve high-level administrative commitment and involvement. Agency assessments will be conducted and an agency-specific plan developed. Internal leadership team(s) will determine and facilitate changes. Staff will be involved at all levels of the agency.

Project staff will work with interested states and agencies to explore options for delivering services tailored to agency needs and available resources. Fees will be established based on scope of work, staff time, travel and material costs to deliver the services requested.

If you are interested in learning more about the availability of training and consultation services, contact:

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