

Case study: Antonio (he/him)

You were thrilled when Antonio applied for a position on your team. His resume is impressive: he is a registered nurse and has provided clinical care in residential, day, and hospital-based programs. In his last role, he led a team of eight direct service providers.

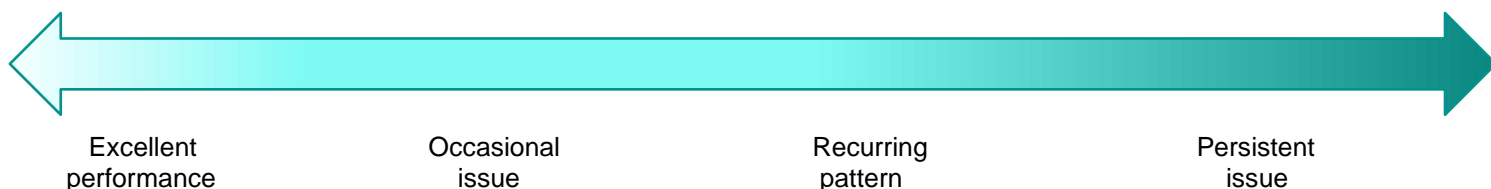
In Antonio's first three months he has made significant improvements to the team's processes. He really runs a tight ship! You knew there was room for improvement but had no idea how many efficiencies there were to be gained by tightening things up. From your perspective, this was a great hire.

You've been hearing grumbles from Antonio's staff, though. People report feeling "managed" rather than "led." The rub seems to be that Antonio isn't particularly collaborative. Apparently he made these changes without consulting anyone. And while the team appreciates efficiencies, some of Antonio's new processes and procedures interfere with their ability to spend the time necessary with clients. They are concerned that under Antonio's leadership, they may not be providing the level of service they believe is in clients' best interest. They wish he'd consulted them before tinkering with the system. Perhaps Antonio's "efficiencies" aren't that efficient after all?

Additionally, you just learned today that Pat, the most senior member of the team, has given notice. You aren't sure yet whether this is related to Antonio's leadership but it does have you slightly concerned.

When you asked Antonio how his supervisory relationships are going, he reports that all is well. He is impressed by the team's commitment to the people they serve and how hard they work.

Where would you place Antonio's performance on the continuum?



Case study: Jasper (they/them)

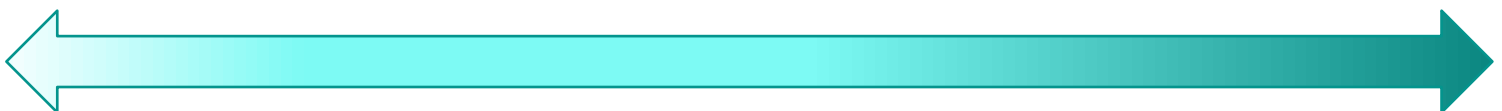
Jasper, a long-term employee, is the operations person for your team. They excel at all things relational! The team adores them. They are a favorite with clients. They can make anyone laugh and they plan really fun activities for staff meetings and outings. Jasper is incredibly dedicated to their colleagues, including you. When it comes to empathy, respect, and interpersonal skills, they are one of the greatest assets on your team.

Their area of weakness, though, is attention to detail. Given their role, this is a problematic deficit. This became glaringly apparent about a year ago when a routine audit turned up missing documentation and database errors that almost cost the agency funding. Though you hated to do it, you had to have a very serious conversation with Jasper about this aspect of their performance. Since then you have been working with them during weekly supervision around improving their attention to detail. You give them regular, constructive feedback and provide more direction around these duties than you had previously. Jasper seems open to your feedback and is genuinely trying to improve. And while you notice some improvement, as soon as you think things are going in the right direction, some other administrative issues comes to your attention.

Yesterday your CFO shared some disturbing news. A number of clinical staff were left off of key liability insurance documentation...over a year ago! The fact that they have been operating without coverage could have been disastrous. Luckily, there weren't any issues and they can be added to the policy immediately. But had things played out differently, the whole agency might have been at risk.

It is Jasper's responsibility to complete that paper work and you know you need to address this. You aren't confident anything you say will make a difference, you've been down this road many, many times. You are going to need a different approach.

Where would you place Jasper's performance on the continuum?



Excellent
performance

Occasional
issue

Recurring
pattern

Persistent
issue

Case study: Carla (she/her)

Carla is a member of your outreach and education team. She designs creative and engaging curriculum and always gets high praise from participants. Other team members often seek her advice and feedback around their own facilitation. Carla is often asked to represent the team's work to the rest of the agency and even funders. Once she was even invited to speak at a conference. Everyone loves Carla – staff, constituents, and even partners from other organizations.

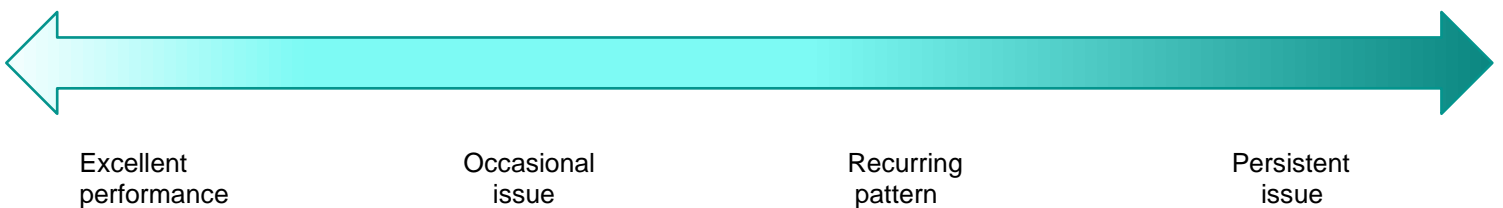
However, Carla has significant issues with timeliness and attendance going back to her interview over five years ago when she was 15 minutes late! Carla rarely makes it to work on time, is always late for meetings, and always has things going on in her personal life that seem to interfere with showing up at all once or twice a month.

Every time you talk with Carla about this you are heartened by the fact that she acknowledges this as an issue she struggles with. Carla wants to do better, but this just seems to be who she is. She confesses that she always underestimates how long it will take to get from one place to another and that she often thinks she can get one more thing done before she needs to be somewhere.

Last week, Carla was invited to join a meeting with partner agencies to discuss forming a new coalition. The group waited for Carla for 10 minutes but eventually decided to start without her. While Carla's absence from this meeting wasn't disastrous, discussion about shared curriculum won't be on the agenda for a couple of months, you were annoyed and embarrassed. When you got back to your desk you did find a message from Carla letting you know she wouldn't be in at all. She said something about her aunt's cousin needing a ride to a medical appointment, having to wait for the cable repair person, and a cat that had hairballs.

It is becoming clear to you that something needs to change here. But you don't want to make Carla feel bad when she is really so good at her job and incredibly valuable to the team and the organization.

Where would you place Carla's performance on the continuum?



Case study: Lydia (she/her)

You have been on the road, visiting all of your program sites across the state, in advance of a major funder visit. You can't really give your attention to anything else right now; a positive report is critical to continued funding. Lydia, your team's coordinator really needs to step up and provide coverage while you are on the road. The issue, though, is that Lydia is currently on a performance improvement plan for lack of follow through, creating scheduling conflicts, and generally poor communication. That said, Lydia has committed to managing the "home-front" while you are on the road.

While you are away from the office, Lydia checks in regularly. She copies you on important emails and leaves you off those you don't need to be bothered with. She is sending really helpful daily reports that prioritize issues you need to address or questions for you to respond to. You have even received a text from a colleague in another department praising Lydia's effort to provide them with hard-to-find data. And HR let you know that Lydia was the first to submit timesheets for the team and that her payroll-reporting was spot-on.

You are pleasantly surprised by how smoothly things are operating in your absence. And you just received word that your funder is pleased with their findings and that they'll not only be refunding the work but increasing dollars for the next fiscal year.

Where would you place Lydia's performance on the continuum?

