TOOLS OF THE TRADE: Preparation for Supervision



Supervisory Field Practice Guide

Designed by Field Leadership Learning and Development

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<u>NOTES</u>

DHR Mission and Vision Statement

<u>Mission</u>

 To be a resource for strengthening families, not a substitute
 Stronger Formation

 * Supporting their self-sufficiency
 * Helping them protect their vulnerable children and adults

<u>Vision:</u> Stronger Families for a stronger Georgia

MEMO FROM THE COMMISSIONER

As Commissioner, many of you have heard me say, "**No one works well unsupervised – not even me.**" Even I find this hard to process, because I do not like the thought of someone "breathing" over me, watching my work, and "micro-managing" me. Yet, I know, from experience that I do not work well unsupervised. And the kind of supervision I am talking about is not constant surveillance. Instead, I am talking about consistent, predictable management and monitoring practices that hold your employees (and you) accountable for putting forth your best effort on behalf of the citizens of Georgia.

I write therefore to remind you of this simple warning because, in our day to day work, we can forget. When we do forget, the consequences are not only embarrassing but they rob DHR's customers and stakeholders of services and programs they need.

Simply put, as an agency, we sometimes hold the health and well being of Georgia's children and families in our hands. We need to be trusted and trustworthy. Supervision assures that we never have to doubt the public's trust. Lack of supervision almost always guarantees that we lose the public's trust. As public servants, that is our lowest and worst outcome.

I ask, therefore, that each of you examine your responsibilities in this area and do whatever is necessary to make sure that neither you nor anyone working with or for you is unsupervised. Although we can never make up for the actions of anyone who intends to do wrong, we can hope to minimize the opportunities we present, as supervisors and co-workers, for them do that wrong.

As always, I thank you for your dedication and service to the State of Georgia and the Department of Human Resources.

B. J. Walker

Commissioner

Introduction to Field Practice for New Supervisors

Tell me and I will forget; Show me and I may remember; involve me and I will learn! Anonymous

Supervisors hold one of the most critical and challenging positions within the Division of Family and Children Services. Being proficient in carrying out the educative, supportive and administrative aspects of supervision is essential in supervising staff, ensuring child safety and permanency and in strengthening the families of Georgia.

To ensure a high level of skill and competency the Division requires new supervisors to successfully complete a training process. This begins with a sequenced combination of online training followed by 40 hours of classroom instruction and 15 work days of field practice.

Note: New Social Services supervisors in Fulton and Dekalb Counties must complete 40 hours of classroom training and pass a skills based competency test with a score of 70% or higher prior to assuming any supervisory duties. Every Social Services Supervisor must complete The Tools of the Trade classroom training and the skills based competency post-test prior to certification.

The Field Practice phase of training provides new supervisors an opportunity to apply the knowledge learned in the classroom to practice. To ensure that this occurs, coaching and feedback during the field practice phase of training will be provided by e-mentors from the Learning and Performance Branch.

While learning in the classroom provides an opportunity to acquire knowledge, field practice addresses actual performance. The purpose of Field Practice is to concentrate on those activities that most impact new supervisors and will help them understand, prepare for and perform supervisory responsibilities. The transition to a successful Department of Family and Children Services supervisory role requires a teamwork approach. The team includes managers within the county, Field Program Specialists, County Directors, e-mentors and members of the Leadership and Development Unit .

Guidebook

The Field Practice Guide was developed to provide guided experiences utilizing critical skills and combining them with duties required of supervisors. Activities will be introduced and discussed during classroom training. The Field Practice Guide is a tool to assist supervisors in achieving position mandates, gaining self confidence, demonstrating problem-solving and completing routine and emergency tasks. Case specific consultation will not be provided. New supervisors will be directed to discuss these issues with their supervisors or field program specialists. Directions for each

activity are given in writing. There is a 15 work day time frame for completion of all field practice activities. Some of the exercises in the Field Practice Guide may be combined. It is recommended that supervisors take advantage of combining activities whenever possible. Please see the Helpful Hints on Page 7.

During the 15 consecutive work days of field practice each new supervisor will be assigned an experienced mentor who, whenever possible, will be one of the supervisor's classroom trainers. This e-mentor will provide coaching, continued training, clarification and feedback. The new supervisor and e-mentor will discuss assignments on a regular basis. It is the responsibility of the new supervisor to stay in contact the e-mentor. This prearranged contact may be through e-mail, fax or by telephone. If possible, the e-mentor will occasionally observe a field practice activity in the supervisor's county office. Throughout the process, progress will be assessed by the e-mentor. At the conclusion of the time limited field practice the e-mentor will provide written feedback to the new supervisor's manager and/or County Director. Failure to successfully complete any field practice module during the allotted time will result in a recommendation by the e-mentor that the supervisor receive local assistance in completing all required exercises before consideration for certification.

It is **critical** that counties and regions continue consultation with each new supervisor and provide ongoing coaching. Specific Tools of the Trade classroom activities were chosen because they are representative of activities that supervisors are involved in on a day-to-day basis. Activities in the Field Practice Guide allow the new supervisor to build on their classroom learning with real work tasks in the county office.

HELPFUL HINTS ON USING THE GUIDE

It's a good idea to review the entire *Tools of the Trade* Guide before beginning any of the activities. This review will indicate activities that require information from your direct supervisor. You'll also discover through reviewing the Guide that you can combine some of the activities in the modules, but keep in mind some of the activities ask for a *written* response.

Below is a list of items you will need to locate in order to complete the module and

***schedule a time to meet with your supervisor/county director for the modules noted with an asterisk.

| Knowledge of local DFCS Office and Community PG 10 |
|--|
|--|

- ____ Current Org Chart for county and region.**
- ____ List of County Board members for County Office.**
- ____ Copy of County Emergency Plan/description of your responsibility in the event of an emergency.**
- ____ Current Phone Directory/Phone Tree for County staff.**
- ____ Copy of county protocols for child safety, i.e. County Child Abuse Protocol.**

Miscellaneous Administrative Responsibilities PG 12

- List of Administrative Tasks that belong to your position** Be sure to discuss persons who may be "administratively" supervised by you vs. direct supervisees.**
- ____ List of items that require your signature before being forwarded to accounting.**
- ____ Copy of Agency Constituent Services Plan**
- ____ Copy of Agency Protocol for Customer Complaints **

Performance Management Process/Form PG 14

- Copy of Generic County Director PMP (one is provided in online Toolbox
- ____ Copy of your own PMP
- ____ Copy of the PMP for the persons you supervise.

Program Policy

PG 20

Up-to-date (Social Services) manual

| OFI Part I: Administrative Hearing Process Administrative Hearings Log for County. Fiscal Responsibilities PG 25 Copy of county tracking forms used to manage fiscal budgets.** Most recent Revenue and Expenditure report, if your director feels in | | |
|--|-------|--|
| Fiscal Responsibilities PG 25 Copy of county tracking forms used to manage fiscal budgets.** | | |
| Copy of county tracking forms used to manage fiscal budgets.** | | |
| Copy of county tracking forms used to manage fiscal budgets.** | | |
| | | |
| Most recent Revenue and Expenditure report if your director feels it | | |
| Most recent Revenue and Expenditure report, if your director recising | it is | |
| appropriate. | | |
| | | |
| Data and Reporting PG 27 | | |
| Copy of county-specific reports you are responsible for and due date | e** | |
| Pull most recent SUCCESS (OFI) or IDS/TCM/AFCARS (Social | | |
| Services) reports for appropriate program areas (see Module 12 for a | | |
| listing of reports and where to obtain them) | | |
| Print out most recent E&R Reports for appropriate program areas. | | |
| | | |
| Quality Assurance Review/Quality Improvement Plan PG 34 | | |
| Copy of most recent QAR (E&R) review. | | |
| Copy of any current QIPs in place for the county | | |
| | | |

Activities that require discussion and input from your immediate supervisor after a portion of the work has been completed in addition to the items listed above.

A separate e-mail will be sent to your supervisor listing the items you will need to complete the modules.

- Unit Expectations (Page 18)
- First Activity under Legal (Page 22)

Activities that require discussion and input from your Field Program Specialist after a portion of the work has been completed.

A separate e-mail will be sent to your Field Program Specialists listing the items you will need from them to complete the modules

- Data Management and Reporting (Page 27)
- Supervisory Case Reviews (Page 32)
- > QAR/Quality Improvement Plan (Page 34)

Activities that may be combined with the Unit Meeting.

- Communication Styles Survey. (See online Toolbox)
- Presentation of Unit Expectations to the Unit. (Page 18)

Knowledge of Local DFCS Office and Community Resources

"Finding good players is easy. Getting them to play as a team is another story." Casey Stengel

Objective:

To provide you an opportunity to acquaint yourself with county staff, the chain of command, county protocol and the County Board; furthermore it is intended to aid you in accessing resources in the community that can work together to assist the families served by your unit and give you an overview of your role in the event of an emergency.

Discussion

Each county is a part of a larger organizational structure. Understanding a specific county and how it fits in the larger context under State and Federal mandates is fundamental to supervisory success.

A Department of Family and Children Services agency is located in each of the 159 Georgia counties. The counties are organized into Regions, with the exception of Fulton and Dekalb Counties.. Each Region has a Regional Director who oversees the county offices within that region. County DFCS offices are also classified by size. The largest offices are a Class V (sometimes referred to as a metro or urban county) and the smallest office is a Class I (sometimes referred to as rural). Class III Counties and smaller often are managed by multi-county directors and supervisors. Each individual county has community resources which you need to become familiar with Your knowledge of and working relationships with the county's and utilize. community enhances the agency's profile and many times provides children and families with benefits that would otherwise be unavailable. Examples are Secret Santa Christmas donations, food banks and foster care recruitment. Also, it is vital for supervisors to know the community resources in the event a county emergency plan has to be activated.

Supervisory Practice Activity

> Obtain a current organizational chart from your immediate supervisor.

> Discuss with your supervisor the chain of command in your county, including both formal and informal procedures.

- > Obtain a list of the County Board members.
- > Obtain and review your county's protocols, i.e. the local Child Abuse Protocol.

> Obtain names and telephone numbers for any Field Program Specialists who serve your county.

> Find out from your immediate supervisor what the county's responsibilities and specifically your role in the event of a natural disaster or community emergency.

> Obtain a current office telephone directory/list.

> Obtain or develop an up-to-date telephone list for after hours. Add telephone numbers needed for after work hours.

> It is recommended that supervisors and case managers maintain updated copies of contact numbers in their homes, offices, and automobiles.

> Develop an up-to-date resource list that includes telephone numbers for county and/or city law enforcement, foster parents, support organizations, and other relevant community partners. It may be helpful to borrow a list from a veteran supervisor.

Discuss with the e-mentor.

Recommended Additional Supervisory Practice Activity

> Determine whether your local county office or the county government office has a website. If there is a website, the supervisor will research the information to know what is available.

> Learn what community organizations (Rotary Club, Lions Club, etc.) are in the county including where and when they meet.

Secure a list of AA, Al-Anon, NA and any other support group meetings for the county.

Discuss with the e-mentor when this is complete and discuss your work

General information regarding Georgia DFCS can be found at the following web address: http://dfcs.dhr.georgia.gov/portal/site/dhr-dfcs/

Information regarding County DFCS Boards can be found at the Field Fiscal Services website at <u>http://167.193.156.254/FFS/.</u>

Administrative Responsibilities

"At a minimum, the objective of (administrative tasks) is to see that no harm has been done," Kadushin

Objective:

To discuss some of the administrative responsibilities that come with supervision and discuss their value vs. tasks that involve personal contact.

Discussion

Every job has basic responsibilities that are critical to providing a process and environment in which the job can be carried out. The administrative responsibilities of supervision are numerous and include:

- Hiring
- Working with New Staff
- Exit Planning
- Creating Productivity Files for Employees
- Managing Training Needs of Self and Staff
- Administrative Communication to staff 'down the chain' /Advocacy for staff 'up the chain'
- Oversight of various Budgets (where applicable)
- Managing Time Sheets and Travel
- Managing the RMSS process

These tasks are very important to providing the framework and structure in which staff can perform the work; however, if a supervisor spends more time doing administrative tasks than taking the time to manage and support staff (refer to Module 4: *Roles of Supervision and Styles of Supervision sections)* then his/her effectiveness will be diminished.

- Visit Field Fiscal Services Website/ Audit Section to review travel requirements. (http://sao.georgia.gov)
- Discuss with your immediate supervisor the difference in being an hourly employee and a salaried employee and how this affects compensatory time, etc.
- Obtain a list of administrative responsibilities of your job from your supervisor.
- Review process for completing time sheets and allowable work schedules in your Resource Manual as well as ODIS/administrative section.
- Review with immediate supervisor items that require your signature before forwarding to accounting; Authorization for disbursement, overtime approval, invoices for MOUs, etc.
- Inquire about Skills for Successful Supervision course from OHRMD website (see training section)

- Refer to items in online Toolbox regarding Exit interviews and planning, Random Moment Sample Surveys (RMSS), Overview of Hiring, Conflict of Interest (Standards of Conduct memo) and examples of orientation and exit checklists. Discuss questions regarding these processes with your immediate supervisor.
- Obtain a list of persons you directly supervise vs 'administratively' supervise, discuss with your immediate supervisor the expectation for those administratively supervised (i.e. Regional Staff housed in the county office, multi-county staff, etc.)
- Social Services: Read/Review the most recently revised "New Worker Field Practice Manual. This may be found at <u>www.gadfcs.org</u> website. The introduction section will outline the entire certification process, including the critical role of the supervisor in the process.
- (Social Services) Review and discuss the certification process with a new case manager under your supervision. In the event there is no new case manager involved in the certification process during the 15-days of Supervisor Practice Activities, familiarize yourself with the entire certification process for case managers.
- Discuss with e-mentor the different types of training available to staff and supervisors and how to access each. (Social Services) Discuss with e-mentor the annual number of Professional Development hours required to maintain certification.
- Establish a <u>Productivity File</u> for each staff member you supervise (if one does not exist already). Files should be placed in a locked cabinet or desk.
- > Discuss recommended format and file type to be used in setting up files.

Recommended Productivity File Includes:

- Use of a three-ring notebook or accordion file
- Setting up the following section labels: (1) Basic Information Sheet, (2) Orientation Checklist, (3) Statement regarding core working hours, (4) Performance Management Plan, (5) Caseload Logs, (6) Tear Sheets – Social Services, (7) Case Record Reviews or Summary of Reviews, (8) Individual Conference Notes, (9) Commendations/Complaints, (10) Employee Discipline, (11) Training Log to track mandatory and elective training.

Performance Management: Process and Forms

"I know the price of success: dedication, hard work, and an unremitting devotion to the things you want to see happen." Frank Lloyd Wright

Objective

To assist you in understanding your role of evaluating the performance of your staff and also your role of accountability in the performance management process

Discussion

The Performance Management Process (PMP) is a year round process of planning, coaching, evaluating, and developing employees. Supervisors are expected to work with their employees daily in this on-going process. Supervisors share accountability with their workers for job performance. Clear expectations must be set forth on the Performance Management Form (PMF) at the beginning of the work period and must be regularly monitored throughout the period. At least once during the review period, the supervisor must complete an Interim Review on each employee, this is usually done in January of each year. On-going coaching, evaluation and feedback must occur during the evaluation period. In order to manage staff effectively, you must review all expectations set forth for your staff by the previous supervisor. It is also important that you understand your PMF and have a clear understanding of what is expected of you during the report period.

Supervisory Practice Activity

Secure and read your own PMF as well as copies of the PMF for all workers you supervise. File the workers' copies in their Productivity Files if this has not already been done.

> Review the PMFs of two workers with those workers and document the discussion.

> Review the generic County Director PMP in the Toolbox.

Visit the OHRMD website <u>http://www2.state.ga.us/departments/dhr/ohrmd</u>

Visit the Georgia Merit System website <u>http://www.gms.state.ga.us</u>

Review the information available at the above website paying particular attention to resources regarding personnel and both PMP and Skills for Successful Supervision training.

Discuss with the e-mentor all findings and interrelatedness of the County Director and Supervisor PMFs.

> **Discuss with the e-mentor** all findings and interrelatedness of these documents.

Roles of Supervision

"Effective leadership is putting first things first. Effective management is discipline, carrying it out." *Stephen R. Covey*

Objective

Intended to offer for consideration an overview of Kadushin's three primary roles of supervising in the human services fields: administrative, educative and supportive. After completion of the module, you will be able to identify when you are acting in each role, able to assess your level of functioning, and able to outline specific actions for improvement in your level of functioning.

Discussion

Classroom presentations and required readings provided information on the three primary roles of supervision. It is important for supervisors to demonstrate proficiency in the day to day practical aspects of each role. In order to do that, you need to be able to identify your strengths and needs relative to each role and find ways to address the need areas.

It is important to remember that roles overlap and that some tasks will fit into two and some into all three roles. For example a case conference could be both educative and supportive. You will use the conference to teach the worker regarding practice and policy but will also be supportive with appropriate praise.

Supervisory Practice Activity

Complete the Unit Profile for each staff member and for yourself. (See Toolbox for the Unit Profile form.)

> Using this profile, determine what administrative actions are necessary to assure a better organization and functioning of the unit.

> Using this profile, determine what educative steps must be implemented to ensure that staff members have the knowledge and skills to do their job.

> Using the profile, determine what supportive supervisory action will need to be taken to motivate and inspire staff in this particular work setting.

> Document and/or be prepared to **discuss with the e-mentor** a list of three actions or steps for each of the above.

Meetings

"If your actions inspire others to dream more, learn more, do more and become more, you are a leader." John Quincey Adams

Objective

To assist you in understanding your role as a leader and as a participant in a variety of meeting settings. You will develop skills and gain knowledge to prepare and conduct effective meetings.

Discussion

You will be responsible for planning, scheduling, facilitating and/or attending meetings with both internal and external participants. There are basic components to every successful meeting that include the following: purpose, expectations of outcomes, attendees, agenda, appropriate setting/location, presentation skills, tracking time and outcomes and follow-up. Follow-up is a necessary and often overlooked meeting component. It has been stated that a meeting with no follow-up was an unnecessary meeting.

In meetings with community partners and other external customers, you represent the agency. It is critical to understand that role and be aware of your participation and presentation at these times. Preparation for these meetings is necessary. You should assure that you are knowledgeable about the issues to be discussed.

A regular and critical meeting to help supervisors keep their finger on the pulse of their unit functioning is the unit or team meeting. As presented in classroom training, unit meetings should be held on a regular basis to meet unit needs. The ideal frequency may depend on the purpose, how you handle case consultations and the stage of unit development. It is expected that unit meetings will be conducted at least monthly and should be held at regularly scheduled intervals and at convenient times. Full unit participation by staff should be encouraged in all phases of planning and conducting the meeting. You should make meetings meaningful, using meetings to coach, model, and problem-solve, and manage administrative details. Furthermore, they should use unit meetings to set and check on unit goals and expectations.

Another critical meeting which emphasizes unique skills and leadership abilities is the Family Team Meeting (FTM). A primary principle of the FTM process and of all

successful meetings is knowing/understanding the basis of having the meeting. In a FTM the goal is to make a plan or make a decision which focuses on the solution of a problem rather than the problem. The inevitability of spending much of your time in meetings is a fundamental fact of our or any organization.

Supervisory Practice Activity

You will plan, schedule and conduct a unit meeting during your field practice. (See the Toolbox for a Checklist which can be used to evaluate the meeting.) You will need to:

> Determine the date, time, and location of the meeting.

> Announce the meeting to staff. Advise them of mandatory attendance and participation.

- Develop a participatory agenda.
- > If possible, include unit expectations in final or draft form as an agenda item.

> Discuss preparations with e-mentor at least one day before the unit meeting. Send copy of agenda to e-mentor.

- > Determine any special preparations needed i.e. copies, refreshments.
- Arrive early in order to be prepared and to take care of any last minute needs.

Conduct the unit meeting remembering to encourage participation by all unit members.

Consider ending the meeting on a positive note, recognizing successes and with planning for the next meeting.

- Model professional behavior.
- > Arrange for minutes to be documented, distributed, and filed.
- > Maintain attendance, minutes and handouts in a supervisory file.

> Evaluate and **discuss meeting outcomes with the e-mentor**.

It is recommended that you attend an official Family Team Meeting (FTM). If one is not scheduled in your county during Field Practice, contact neighboring counties to make plans to attend an FTM.

- > Attend the FTM.
- > Observe the roles of all participants.
- > Pay special attention to the role of the supervisor and the case manager.

UNIT EXPECTATIONS

"Dictionary is the only place that success comes before work. Hard work is the price we must pay for success. I think you can accomplish anything if you're willing to pay the price." Vince Lombardi

Objective

To provide you with an understanding of the importance of providing clear and direct guidelines for your staff members. This module requires you to compose and distribute Unit Expectations to staff members (a suggested template can be found in online Toolbox.).

Discussion

One of the responsibilities of a supervisor is to establish clear guidelines for his or her workers to follow. Some of these were already established prior to the supervisor assuming responsibilities. For example, DHR has Personnel Policies, DFCS has its Program Policy manuals, and for most counties there are office policies/procedures and guidelines.

The above examples do not cover, and especially do not cover in a concise way, the expectations that supervisors have for their own units. Therefore it is necessary for them to write out such expectations. By doing this, you will provide much needed clarity regarding specific requirements for employees who work under your supervision.

In classroom training, you were introduced to this document and the reasons for it. Now, in Field Practice, you will perform the following activities:

Supervisory Practice Activity

➤ Using the information that was presented in the classroom training along with the electronic format that was forwarded to you and in consultation with the e-mentor, develop a memorandum of supervisory expectations for your unit.

> Prior to sharing the memo with staff members, the unit expectations must be reviewed and approved by your County Director or designee. It is recommended that the County Director/designee sign the cover letter or final signature page.

Begin work on the Expectations on Day 1 of Field Practice.

Notify the e-mentor regarding the status of the unit expectations.

> Once you have approval from your immediate supervisor, submit a draft of the expectations to staff members so they may have input as desired.

Submit your final proposed document to your immediate supervisor for his or her signature and approval and any other approvals required in your county. Once it is approved by upper management, e-mail or fax the document to the e-mentor.

Please do not copy the provided sample memo verbatim. The expectation is that you will tailor the document to fit your individual county and unit, adding items that are relevant to your county agency and unit needs. If you decide to leave out suggested categories, please make sure your management agrees with your decision.

> The Unit Expectations should be saved on your computer (remember to synchronize daily) or use another approved back up system so that unit expectations may be updated as policy and needs require.

> Unit Expectations must be included as an agenda item in a Unit Meeting prior to your certification.

Note case managers' response to the Expectations and be prepared to **discuss responses with the e-mentor** and your immediate supervisor.

Include a sign off sheet or a statement that will be signed and dated by your staff members confirming that they have received a copy of the Expectations and that the Memorandum was reviewed with them.

A signed copy should be filed in each case manager's Productivity File.

> See the Toolbox for lists of Possible Topics to be included and an example.

MODULE 7 Family Centered Practice

"Know this: I will always stand behind you when you are doing the right work, the right way. I will also stand up for you when you are trying to do good things. But I cannot support decisions and actions that do not have a basis in "good." B.J. Walker, DHR Commissioner

Objective

To underscore the importance of promoting strong family centered practice to guide the work of your staff toward actualizing the agency's goal of strengthening families.

Discussion

Policy in all DFCS programs represents a vast amount of material and this material changes frequently. It is necessary that both you and your unit know what policy says, how to interpret it, and how to implement it in day to day practice. Policy is a guideline to use in your efforts at Family Centered Practice.

There is no substitute for reading and consulting policy. Supervisors must know the basics of policy and how to research that which is not regularly used.

Remember also that policy does not think for you. You must be able to interpret the policies, apply common sense and always use good practice procedures. The following are the four essential components of Family Centered Practice.

- 1. The family unit is the focus of attention. Family-centered practice works with the family as a collective unit, insuring the safety and well-being of family members.
- 2. Strengthening the capacity of families to function effectively is emphasized.

The primary purpose of family-centered practice is to strengthen the family's potential for carrying out their responsibilities.

3. Families are engaged in designing all aspects of the policies, services, and program evaluation. Family-centered practitioners partner with families to use their expert knowledge throughout the decision- and goal-making processes and provide

knowledge throughout the decision- and goal-making processes and provide individualized, culturally-responsive, and relevant services for each family.

4. Families are linked with more comprehensive, diverse, and communitybased networks of supports and services. Family-centered interventions assist in mobilizing resources to maximize communication, shared planning, and collaboration among the several community and/or neighborhood systems that are directly involved in the family. Today's emphasis on family-centered practice is rooted in the desire to improve outcomes for families and children. On a national level, the federal government wants to help the child welfare system in the U.S. do a better job ensuring the safety, permanency, and well-being of children.

One of the U.S. government's most important tools in this effort is the child and family services review (CFSR), an intensive evaluation of every aspect of child welfare social work. In working with Georgia and other states during the CFSR, the U.S. Department of Health and Human Services has made it quite clear they see family-centered practice as the core strategy for building effective, ethical, consistent child welfare practice.

Family-centered practice is a vehicle for improving the lives of its families and children. Georgia is encouraging family-centered practice through its training of supervisors and line social workers.

Supervisory Practice Activity

Review concepts of Family Centered Practice. Discuss with your e-mentor. Provide your mentor with an outline of how your unit will incorporate Family Centered Practice into their everyday work. (For another Module, supervisors will attend a Family Team Meeting.)

Secure a complete current (Social Services) manual if you do not already have one. Policy may be referenced online as noted below. It is recommended that (Social Services) supervisors maintain an up-to-date hard copy of the manual in the event computer access is not available. OFI Policy updates are current and maintained on a monthly basis at the website below.

> Check the manual to see that it is current. The log of transmittals should be up to date. If you have received a new manual from the state office, the log will reflect the most recent manual transmittals included in the manual. You may find it helpful to compare "old" manuals to a current manual belonging to a veteran supervisor or your FPS.

> If your case managers use hard copies of the policy manual, make sure that those case managers have updated their manuals and that they refer to policy before coming to you with simple questions.

> Assure that you and your staff members know how to access the policy manual at http://www.odis.dhr.state.ga.us.

> Discuss this with the e-mentor.

> Determine your own level of policy knowledge in your program area of supervision. Are you certified in your program area? Have you passed the knowledge skills test? You will need to ask yourself questions to assess your expertise. For example, have you read the entire manual for your program area? Do you consult the manual when you are not sure of a policy question? What is your county's protocol for contacting your Field Program Specialist for policy clarification or guidance on good practice?

Read and review any areas of policy that you identify. Ask your supervisor or Field Program Specialist for clarification as needed.

Note: On-line program policy training is a good policy refresher. It may be accessed through the following website: <u>www.gadfcs.org</u>

MODULE 8 Legal

"A goal without a plan is just a wish." Antoine de Sainte Exupery

Social Services

<u>Objective</u>

You will gain basic knowledge of the laws that impact the work of the Division of Family and Children Services including legislation addressing Confidentiality, Open Records Act, LEPSI, and HIPAA. You will understand the role of the Special Assistant to the Attorney General.

Discussion

Supervisors who have been case managers are fully aware that law and the courts play an integral part in the work of the Division of Family and Children Services. It will be a crucial part of supervisory responsibilities to ensure that the laws foundational to the work are carefully followed and that the agency maintains a good working relationship with the court, the SAAG, the Guardian ad litems (GAL), and Court Appointed Special Advocates (CASA).

Examples of laws applicable to the agency are the Adoption and Safe Families Act of 1997, the Multiethnic Placement Act, the Foster Parents Bill of Rights and the Child Abuse and Prevention Treatment Act. Some, but by no means all of these, are referenced in the CPS manual. Pertinent child welfare legal material can be researched at the following websites:

- <u>http://www.childwelfare.net/resources/JuvenileCourtRefManuals</u> (Barton Law Clinic)
- <u>www.legis.state.ga.us</u> (Georgia General Assembly for information on Georgia laws) Review all OCGA statutes regarding deprivation of child.
- <u>www.acf.hhs.gov/programs/cb/laws/</u> (Administration for Children and Families for information on federal laws)

Supervisory Practice Activity

- Meet with your SAAG(s) to determine the status of the agency's work with the court and to see if the SAAG has any concerns regarding agency staff relative to State and Federal laws, court behavior and testimony, agency communication with the court system, etc. Listen for positive statements as well as areas of concern.
- Discuss with your staff any concerns they have had in the past with the SAAG's office.
- Meet with your immediate supervisor to discuss these findings as well as to develop a plan to address the findings.

Discuss with your immediate supervisor the county department's protocol when contacted by a local news organization.

If unfamiliar with the following:LEPSI, Conflict of Interest (Standards of Conflict Policy), Confidentiality, access them in the online Toolbox

Discuss with the e-mentor the status of the unit/agency in relation to the court and the SAAG's office as well as your plan to address any concerns or practices that are hindering a smooth working relationship between the two.

Supervisory Practice Activity

If unfamiliar with the information at the above referenced websites, visit the websites. Discuss the information with your unit members. Note information at the Barton website that addresses court preparation and discuss this at a unit meeting.

> Discuss with the e-mentor the specific items from these websites that will be covered in Unit Meeting.

<u>OFI</u>

Administrative Hearing Process Objective

To share basic knowledge of you and your unit's responsibility in the Administrative Hearing Process.

Discussion

Supervisors who have been case managers are aware that clients often disagree with the actions taken by the county department and how it impacts their benefits. Often clients will request a review of the changes through a 'hearing' or an opportunity to have the issue heard by an Administrative Law Judge who is not affiliated with the county department.

Supervisors should look for opportunities to mediate the action with clients whenever possible prior to it reaching the level of an Administrative Hearing. Often the action is a misunderstanding or miscommunication that can be resolved quickly and efficiently; however, a request for a hearing always requires follow up to the office of the ALJ, even if the problem is resolved. If the client requests a hearing – either verbally or in writing – the county is required to take specific actions to respond to the request.

Special Note: The agency is working diligently to modify policies and procedures that are counter-productive to improving the circumstances of a family. Supervisors should seek out direction and input from their Field Program Specialist and immediate supervisor in situations where the stated policy appears to be counterproductive to strengthening the family. The County Director can take issue with the policy with the Regional Director/OFI Regional Manager if he/she feels implementation of the policy would be detrimental to the family.

Supervisory Practice Activity

- Review the "Hearings" information posted on the ODIS website for all programs under their supervision.
- Locate the county log of Hearing Requests so that it will be easily accessible in the future.
- Investigate the process for hearing cases in your county. For example, some counties are required to travel to the county seat in the area to have the hearings in person. Find out where the hearings are held (address, building, etc.)
- Discuss with your immediate supervisor the county department's protocol when contacted by a local news organization.
- If unfamiliar with the following:LEPSI, Conflict of Interest (Standards of Conflict Policy), Confidentiality, access them in the online Toolbox
- > Discuss their progress with the *e-mentor*.

MODULE 9 Fiscal Responsibilities

Can anybody remember when the times were not hard and money not scarce? Ralph Waldo Emerson

Objective

That you gain knowledge of the fiscal policies relative to the programs you supervise and that you be aware of the specific points at which supervisory approval is required.

Social Services

Discussion

In Social Services Programs, there are multiple funding sources, some of which supervisors must track. The requirement is that you make yourself aware of the funding sources and become knowledgeable of the requirements and parameters for the use of these funds. In addition, where tracking of these funds is your responsibility, you must have a tracking system in place and keep it updated regularly.

Following are examples: PUP Homestead Parent Aide Wrap-around Services Comprehensive Child and Family Assessment funds UAS Codes Helpful tools in each county office or available online include: Chapter 16 of the Child Placement Manual The Costar Manual Field Fiscal Services website at http://167.193.156.254/FFS/ State Accounting Office at http://SAO.georgia.gov

OFI

Discussion

In OFI Programs, there are limited funding sources, some of which supervisors must track. The requirement is that supervisors make themselves aware of the funding sources and become knowledgeable of the requirements and parameters for the use of these funds. In addition, where tracking of these funds is the supervisor's responsibility, they must have a tracking system in place and keep it updated regularly.

Following are examples: 527 Childcare General Services (where applicable) UAS Codes

Helpful tools in each county office include MOU Power point and other materials developed by the Regional Field Fiscal Services Unit (Regional Accounting)

Field Fiscal Services website at <u>http://167.193.156.254/FFS/</u>

Supervisory Practice Activity

Consult with your immediate supervisor to determine which fiscal programs you are responsible for tracking.

Find out whether the county already has tracking forms in use that meet the needs of the county. If forms already exist and administration wishes to continue their use, you will need to find out from your immediate supervisor how to complete and maintain these tracking tools.

Request a copy of the Revenue and Expenditure Report for the county, provided that your immediate supervisor approves the request. If you are able to obtain the report, ask your supervisor for a time to review the document together.

If no tracking forms are currently in place or administration would prefer a different form, you will need to develop a tracking tool that will meet the needs of your county. The e-mentor can assist you in developing a form.

Discuss with the e-mentor which tools you will use to ensure that financial accountability standards are being met. You will need to understand where and how to retrieve needed data as well as when and where to submit the forms.

(See the Fiscal/Program Reporting and Monitoring section of the Conference Guide which tracks monthly statistics and is reported quarterly.)

MODULE 10 Data Management and Reporting

"Not everything that can be counted counts and not everything that counts can be counted." Albert Einstein

Objective

To assist you in using and understanding data to manage the performance of your unit by reviewing the data that is available for each Program Area. Also how to access and interpret some of the more critical data sources available.

Discussion

One of the most critical tasks of managers/supervisors is the tracking and reporting of data. Almost everything the Department of Family and Children Services does has a data component. It is essential that you know where to find the specific data you need, how to interpret it, and what to do with it. This includes compilation of reports that go above the supervisory level.

Not all supervisors are responsible for the same reports and tracking tools. Therefore, you will need to find out from the County Director/Designee those reports for which you are responsible.

Where Data is found:

SOCIAL SERVICES

IDS/TCM/AFCARS

(A list of these is found in Appendix D of Chapter 60 of the Social Services Manual.)

Reports submitted to you from your workers

- TCM Tear Sheets
- Caseload listing including contacts, case plan due dates, etc.

Examples of reports to complete:

- Regional Director's Monthly Data Report
- Regional Director's Quarterly Conference Guide
- County Specific Reports
- Tracking Logs for Each Program

- Board Report
- Family Services Worker Report
- Serious Injury/Child Death Report
- Adoption Report
- Adam Report

Additional Statistical Reports:

- Supervisor's calendar
- After Hours Schedule for On Call Workers
- Training logs for staff and supervisor
- Leave record for staff and supervisor
- Supervisory Case Record Review Summary Report
- Financial tracking reports (*covered in fiscal section*)
- Travel expenditures for staff

<u>OFI</u>

- E&R primarily reports county-specific information, but contains some client-specific information for some programs, such as TANF.
- SUCCESS contains primarily client and worker-specific information, but contains some county-specific overviews. The county is encouraged to utilize the Eligibility Log for tracking casework, information from the county eligibility log should be compared to the E&R and SUCCESS reports to insure the integrity of the information.
- County Reports available from County Director or Administrator.

See Table of Reports in Resource handouts for examples of Reports, Due Dates and Who to send them to..

Additional Statistical Reports:

- Supervisor's calendar
- Training logs for staff and supervisor
- Leave record for staff and supervisor
- Supervisory Case Record Review Summary Report
- Financial tracking reports (*covered in fiscal section*)

Supervisory Practice Activity

Secure from your immediate supervisor a copy of the previous month's reports for which you will be responsible.

> Discuss with your supervisor when each report is due and where to find the information needed to complete each report.

> Determine a plan for completing your required reports; including the methods you will implement in order t obtain needed information.

| Determine reports that you require your staff to complete. Make a list of these reports, including due dates and forward a copy to the e-mentor. Remember to include the list and pertinent directions for completion in your unit expectations. Review each of the county reports located in the IDS/TCM/AFCARS system. Review the Outcome Measures that impact your program area. Review to assure that data is being entered correctly into the IDS system. | |
|---|--|
| Review the reports available for the prior month for each program area, carefully consider possibilities for why the numbers are the way they are. From the information in the reports and in discussion with your Field Program Specialists and your supervisor, write down an area that needs improvement that is critical to your job function. | |
| Discuss with your Field Program Specialist or your supervisor your hypothesis at the work, ask if he/she has an insight/information that would support your belief. for their assistance in locating additional data that support or dispel this belief. | |
| Discuss each step of this activity with the e-mentor either by phone or email. Questions may be directed to the e-mentor or your Field Program Specialist. | |

MODULE 11 Conferences & Staffings

"The Main Thing is to keep the Main Thing the Main Thing" Stephen R. Covey

Objective

To provide you an opportunity to increase your skills, knowledge, and tools that will be required to prepare and conduct effective individual worker conferences, case conferences and/or case staffings.

Discussion

Individual worker conferences are a valuable tool for enhancing worker performance. Conferences can be used to explain or review policy; pinpoint individual areas of need; plan methods for improving performance and reinforce areas of commendable performance. The individual conference allows the supervisor to focus specifically on the performance of the individual worker. This cannot be done in a unit meeting. Supervisors should conduct individual conferences at a frequency that meets the needs of both the worker and the supervisor. It is good practice to hold these conferences at least monthly with each staff member. Frequency of these conferences is best determined by need and stage of worker development. The atmosphere in these meetings should encourage staff input, and should be a time for the supervisor to coach, provide feedback and document employee performance toward achievement of unit goals.

A case conference is, in most cases, a discussion between the supervisor and the case manager and/or other DFCS employees. This is the conference in which the supervisor provides clinical supervision and case specific information is shared. Case management direction and approvals are determined in concert with the case manager during these conferences. Case conferences may be conducted during an individual conference. Some supervisors conduct team case conferencing as a learning/teaching opportunity for staff. Documentation and follow-up are critical to this type of conference. The frequency of case conferences is determined by program policy, the stage of worker development, and the complexity of the case issues.

A case staffing will generally involve the case manager, the supervisor and one or more persons from agencies outside of DFCS.

Supervisory Practice Activity

Plan, schedule, prepare for and conduct individual conferences with at least two workers during field practice. It is important to remember the difference between individual (scheduled) conferences and case conferences or staffings, as explained above.

> Determine the location and time for the individual conferences. Notify each worker of the mutually convenient time.

Advise the workers of expected preparation for their individual conferences.

> Determine the method you plan to use for documentation of each individual conference, as discussed in classroom training. (The attached conference guide may be used.)

Prepare for the conferences by considering such things as worker responsibilities and expectations (PMF), worker performance, record reviews, IDS Online reports, observations and other gathered criteria.

> Discuss the individual conference preparations with the e-mentor by phone or email

Conduct the schedule individual conferences, being mindful to review your agenda and allow time for worker input.

> Maintain conference documentation of conference for the worker's productivity file.

Assure that you and the worker have a copy of the conference notes and any action plans.

Discuss assessment and evaluation of the individual conference with the e-mentor by phone and/or email.

MODULE 12 Supervisory Case (Accuracy) Reviews

"I'm a great believer in luck and I find the harder I work, the more I have of it." Thomas Jefferson

Objective

To help you develop an understanding of the importance of the case review process and to provide an opportunity to practice completing case reviews.

Social Services

Discussion

Supervisors are required to read a minimum of one case record per worker per month. Good practice dictates that if a case manager covers more than one program area that the supervisor review records in more than one area. In addition to these mandated reviews, supervisors should be conducting random record readings for specific reasons throughout the month. Additionally, they should read documentation prior to making any approvals or signing waivers. These different purposes for reviewing records will ensure that documentation supports where funds are used, how they are used and how effectively they are used, track what the agency and clients are doing, assure quality control and that policy, good practice and legal mandates are met. As discussed in classroom training, record review results may identify training needs of staff or may identify performance issues.

Case record review results are placed into the case manager's Productivity File and results will affect the case manager's PMF. Current policy requires that the case review be placed in the case file. Each supervisor must develop a tracking system for corrections and must use that system for assuring follow-up.

<u>OFI</u>

Discussion

Supervisors are required to read a minimum of case records that is dependent on the programs they supervise and the number of staff in the county, including the number of supervisors allocated to the county. A copy of the CAR requirement for each county can be obtained from the Regional Field Program Specialists or Judy Jones at 2 Peachtree. Good practice dictates that if a case manager covers more than one program area that the supervisor review records in more than one area. In addition to these mandated reviews, supervisors should be conducting random record readings whenever possible to determine trends and error-prone areas. These different purposes for reviewing records will ensure that documentation supports the decisions made when determining the benefits each family is

eligible for. Record review results may identify training needs of staff or may identify performance issues.

Case record review results are placed into the case manager's Productivity File, and results will affect the case manager's PMF. Current policy requires that the case review be placed in the case file. Each supervisor must develop a tracking system for corrections and must use that system for assuring follow-up.

Supervisory Practice Activity

Randomly select two cases to read. If you supervise more than one program area, please select one case from each of two different programs.

> (OFI) Use CAR Process Memo and guidelines to review the records. Socre the review form to determine the percentage of accuracy.

(Social Services) Use Review Guides sent to the regions and counties by Field Operations. The most recently revised Review Guides as of August 2007 were forwarded by Project Administrator Dallas Williams on August 3, 2007. After completion of the reviews, determine the percentage of accuracy for each.

> The results from the cases reviewed for each worker need to be discussed with each worker, including discussion of needed corrections and the due date for corrections.

Request a second level review of at least one record by your immediate supervisor, Field Program Specialist, County Director, Program Director or an Administrator. (For Social Services: If the second level review is completed by your County Director, Program Director, an Administrator who does not directly supervise you or your Field Program Specialist, the second level review may count toward one of your final certification requirements.) Forward a summary of review results to the e-mentor for review and discussion

Discuss with the e-mentor findings and your plan for correcting the errors found in cases.

Qualitative Case Reviews, Quality Assurance Reviews and Quality Improvement Plans

"A good leader is a person who takes a little more than his share of the blame and a little less than his share of the credit." John C. Maxwell

Objective

To insure you understand the purpose and content of your county's Qualitative Case Review (QCR) or Quality Assurance Review (QAR) and understand your supervisory responsibilities in the implementation of a Quality Improvement Plan. (QIP)

Discussion

The Evaluation and Reporting section of DFCS comes to County offices to review records for policy compliance and service provision. Counties are notified in advance of these reviews. Upon completion of the review, an exit meeting is held to inform the county of their findings. A written report is sent approximately 30 days after the exit.

Once the county receives the written report, the administration of that county sets a time frame in which to respond to the report with a Quality Improvement Plan. Generally, the Supervisor(s) have significant input, and usually are totally responsible for writing the QIP, although the Field Program Specialists should be consulted in development of the QIP. The administration will review and approve the document before submitting.

It is expected that all items in the Evaluation and Reporting review that are identified as trends needing correction will be addressed in the QIP. Supervisors need to be very specific regarding what type of action will be taken to remedy the trend areas and the time frame in which those actions will be executed.

It is the supervisor's responsibility to follow up with upper administration to inform them what is happening in relation to the plan and to inform them when the actions in the plan have been completed.

Supervisory Practice Activity

Secure a copy of your county's latest QCR or QAR and QIP from your County Director/designee.

Study the QAR report and discuss the outcomes with your immediate supervisor. Also discuss the actions required in the QIP and your responsibilities.
 Determine the current status of progress in your county in relation to the QAR and QIP.

Social Services) If your county's most recent QAR is more than 15 months old select and review at least six case review guides from workers' productivity files, noting child safety, case management and/or documentation trends that require attention and/or training. If no case record reviews are available, discuss with your immediate supervisor and Field Program Specialist, any trends/needs that they have assessed within your unit/program area.

> **Discuss with their immediate supervisor and the e-mentor** how you will resolve issues that have not been corrected and consequently, how you will prepare your unit for the next QCR/QAR. Please be specific regarding findings steps that will be taken toward improvement.

MODULE 14 Cultural Awareness

"Now, I say to you today my friends, even though we face the difficulties of today and tomorrow, I still have a dream. It is a dream deeply rooted in the American dream. I have a dream that one day this nation will rise up and live out the true meaning of its creed: - 'We hold these truths to be self-evident, that all men are created equal." <u>Martin Luther King Jr.</u>

Objective

The purpose of this module is threefold. First, to make you aware of and develop an appreciation for and respect for the cultures represented in the community in which you work. Secondly, for you to begin considering how services can be strategically planned and delivered in ways that are sensitive to the needs of these various cultural groups. And third, for you to consider whether there is a multi-cultural aspect to the unit you supervise and decide whether their supervision of the unit is impacted by the different cultures represented.

Discussion

The word "culture" basically refers to anything that is not nature. It is composed of architecture, laws, religion, sports and recreation, politics and government, child raising practices, education, sexual mores and behavior, literature, values, customs, beliefs, family and community structure and a host of other things. In short, it encompasses everything that is not part of the natural world.

Within a given geographical area, if all of the residents are from one culture, then usually there are no problems that can be defined as strictly "cultural" problems. It is when subcultures develop or when people from two different cultures are living in close proximity that prejudice and misunderstanding can lead to uncomfortable relationships, poor communication, and in the worst cases, hostilities. It is then that people begin to think of their culture as better or superior to another. The step beyond that often is for the persons in the majority to assume that those in the minority culture need to change. History has numerous examples of the problems that arise when this happens. Persons do not give up their culture easily, nor is there any compelling reason for them to do so. In a democratic society such as the United States, it has been demonstrated that many cultures can exist side by side and that the benefits of such cultural meshing far outweigh the negatives.

People in social work encounter different cultures everyday. The extent of this depends in part on where one lives. For example, in some of the rural parts of our state, the number of cultures represented may be extremely limited while in the metro area, there may be individuals and families literally from every country and ethnic group in the world. Regardless of where one lives, the foundational beliefs of social work are that all families and children deserve to be treated fairly and in ways that

respect their cultural heritage. To this end, you must be culturally aware and sensitive in the management of your unit, and lead your employees to that same kind of behavior.

Cultural Awareness is an acknowledgement that society is composed of individuals of various racial, ethnic, and cultural groups and that these groups possess diverse values, customs and beliefs. The primary assumption is that all these various people and groups are to be valued in the context of the work done in the Division of Family and Children Services.

Most case managers will have had some exposure to Cultural Awareness in their basic Social Services Training. However, this is such an important aspect of the Social Service delivery system that you will need to remain sensitive to where workers are with this skill and help them to move along the continuum toward cultural sensitivity.

Supervisor Practice Activity

> Determine if the supervisor's local DFCS is already doing something specific to address the needs of various cultural groups within the community? For example, are there county staff members who are bi-lingual?

Identify the groups or organizations that already provide services to specific cultural groups within the community. (Your CRS may be helpful in determining some initiatives.) Make a list of those groups and initiate contact to begin to establish a working relationship with at least one of the groups. **Discuss** your findings and your actions with the e-mentor.

Review your county's LEPSI plan. See an example in the Toolbox.

From county data provided at <u>www.census.gov</u>, determine the

racial/cultural make-up of your county. Develop a short chart with this information. Send this to your e-mentor and be prepared to discuss your findings with your ementor.

> Is your staff representative of the county population? What efforts must you make to assure that services are provided in a culturally sensitive manner?

> What cultures are represented in your staff? Are you aware of any cultural issues among the staff members or between the you and a staff member or members? What can you do to ensure your management of a culturally diverse workforce models the cultural sensitivity and awareness that you want your workers to practice with clients?

Discuss with the e-mentor.

 \land

Your Specific Needs

"The big secret of life is that there is no big secret. Whatever your goal you can get there if you are willing to work". Oprah Winfrey

Objective

To allow new supervisors the opportunity to ask any final questions or review any issues that are not clear before finalizing the field practice process.

Discussion

Many of the tasks a new supervisor will be asked to complete have been discussed by now either in class or with your e-mentor during the past 15 days; however, there may be an issue you would like to revisit or an idea you want to pitch to an experienced 'ear'...however you could best use your final day with your e-mentor is up to you.

Supervisor Practice Activity

Look through your Field Practice Guide and review the modules briefly. See if there are any parts of any of the modules you are not clear on or still need answers on.

➢ Look through the items in your 'inbox, on your desk or from any other source and flag any items you are unfamiliar with or do not understand. Save them for review with your e-mentor. Supervisor Name: _____

County:

TOOLS OF THE TRADE

MODULE SIGNATURE PAGE

| MODULE # & NAME | DATE COMPLETED OR | COMMENTS |
|-------------------------------|-------------------|----------|
| | STATUS | |
| 1. Knowledge of Local DFCS | | |
| Office and Community | | |
| 2. Misc. Administrative | | |
| Responsibilities | | |
| 3. Performance Management: | | |
| Process and Forms | | |
| 4. Roles of Supervision | | |
| 5. Meetings | | |
| 6. Unit Expectations | | |
| 7. Program Policy | | |
| 8.Legal | | |
| 9.Fiscal Responsibilities | | |
| 10. Data Management and | | |
| Reporting | | |
| 11. Conferences and Staffings | | |
| 12. Supervisory Case Reviews | | |
| 13. Quality Assurance Review/ | | |
| Quality Improvement Plan | | |
| 14. Cultural Awareness | | |
| 15. Your Specific Needs | | |

Signatures:

Supervisor

Administrator, County Director or Field Program Specialist

Field Practice Mentor

Date