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Module 5: Endings and Transitions: Managing Staff Retention, Satisfaction and Separation

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Learning Objectives

Participants will be able to:

- Explore strategies to manage endings and transitions ethically and respectfully;

- Examine a continuous appraisal/quality improvement process to encourage best practice and ethical application of performance standards;

- Identify the steps in the disciplinary process;

- Identify the supervisor's role in ensuring staff employ self care;

- Develop the beginning of a plan for self-care; and

- Identify the "next step" in professional growth and development.

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Supervisor Training Series

- *The Preparatory and Beginning Phases of Child Welfare Supervision*
- *Living the Mission of Child Welfare*
- *The Middle/Work Phase of Supervision*
- *Managing Diversity Through the Employment Process*
- ***Endings and Transitions/Managing Staff Retention, Satisfaction, and Separation***

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Roles of Supervision

- **Administrative Supervision**

- Educational Supervision

- **Clinical Supervision**

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Agenda

- Section I: Introduction
- Section II: "Desired" Transitions
- Section III: "Undesired" Transitions
- Section IV: Burnout and Secondary Traumatic Stress: Why Do These Happen?
- Section V: Assessing Risk and Impact
- Section VI: Making a Secondary Trauma Action/Self Care Plan
- Section VII: The Organizational and Supervisory Roles – Building on Prevention and Intervention Strategies
- Section VIII: The Next Step in Professional Growth and Development
- Section IX: Evaluations

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What Are "Desired" Transitions?

- Lateral transfers

- Promotions

- CWEB/CWEL enrollment and graduation

- Leaves of absence

- Retirement

- Other voluntary resignations

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If People Want Them, Why Worry?

- Competition for open positions;

- Lack of respect for newly-promoted managers;

- Problems with transitioning from co-workers to bosses;

- Difficulties in identifying and planning ahead for natural transitions;

- Problems when transitions occur for the wrong reason; and

- Work place morale can be negatively affected.

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What Happens When More Than One Internal Employee Wants a Position?

- Be clear about what you are looking for from the start;
- Be clear about what knowledge, skills, abilities, and personalities are important to the promotion;
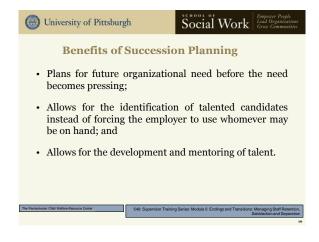- Be prepared to explain why you made your decision; and
- Support your choice.

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What is Succession Planning?

- In short, it means planning ahead for current employees' transitions.

- Succession planning is a key part of overall workforce development, and forces employers to find, assess, develop, and monitor the workforce in a thoughtful way that best facilitates the organizational strategy.

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Benefits of Succession Planning

- Plans for future organizational need before the need becomes pressing;

- Allows for the identification of talented candidates instead of forcing the employer to use whomever may be on hand; and

- Allows for the development and mentoring of talent.

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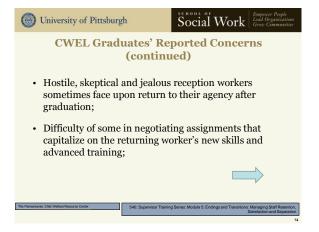University of Pittsburgh — SCHOOL OF Social Work — Empower People Lead Organizations Grow Communities

We're Talking About One Key Person, Right?

- Succession planning is not just about one leader.

- We are talking about identifying those strategies and positions which are "critical" to the success of the organization.

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CWEL Graduates Reported Increased Opportunities

Some graduates reported increased opportunities for:

- challenging assignments;

- creativity; and

- promotions.

(Cahalane and Sites, 2008)

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CWEL Graduates' Reported Concerns

Some graduates report concerns such as:

- Lack of differentiation in job classifications among workers with and without graduate degrees;

- Lack of salary incentives;

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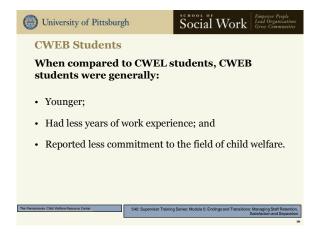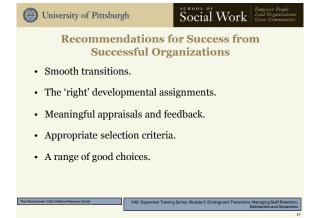
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CWEL Graduates' Reported Concerns (continued)

- Hostile, skeptical and jealous reception workers sometimes face upon return to their agency after graduation;

- Difficulty of some in negotiating assignments that capitalize on the returning worker's new skills and advanced training;

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CWEL Graduates' Reported Concerns (continued)

- Scarcity of opportunities for promotion in some (perhaps many) counties; and

- The sense that advanced educational achievement is not matched with respect and leadership opportunities.

(Cahalane and Sites, 2008)

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CWEB Students

When compared to CWEL students, CWEB students were generally:

- Younger;

- Had less years of work experience; and

- Reported less commitment to the field of child welfare.

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Recommendations for Success from Successful Organizations

- Smooth transitions.

- The 'right' developmental assignments.

- Meaningful appraisals and feedback.

- Appropriate selection criteria.

- A range of good choices.

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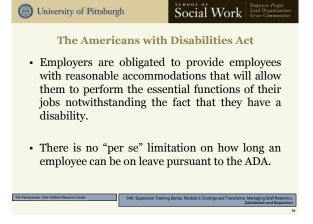SCHOOL OF Social Work | *Empower People Lead Organizations Grow Communities*

Leaves of Absence

- The Family and Medical Leave Act (FMLA)

- The Americans with Disabilities Act (ADA)

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The Americans with Disabilities Act

- Employers are obligated to provide employees with reasonable accommodations that will allow them to perform the essential functions of their jobs notwithstanding the fact that they have a disability.

- There is no "per se" limitation on how long an employee can be on leave pursuant to the ADA.

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How Do I Get Employees on Board with Helping Out During a Leave?

- Tell other employees that the worker is on permitted leave;
- Be clear and honest with employees about the need for assistance and the reasons for it;
- Give details regarding how long the "extra work" is expected to last;
- Ask them to put themselves in the shoes of the employee on leave;
- Let staff see that you are willing to put in extra work; and
- Appeal to the sense of teamwork.

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Responding in the Face of Voluntary Resignations

Initial Steps:
- Assess the reasons (stated and unstated) to determine how a resigning employee should be permitted to work for the remaining "notice" period;

- Determine early how client/customer contact will occur and who will be responsible for making those calls; and

- Have a timeline ready for the transition, with specific steps about how the departure will be handled.

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What Are "Undesired" Transitions?

- Disciplines;

- Demotions;

- Negative Performance Evaluations;

- Suspensions; and

- Terminations.

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Corrective Action Plan

- Created for employees who are not meeting minimum standards.

- Includes measurable goals for improvement.

- Require additional follow-up to monitor progress.

- Require interim evaluations.

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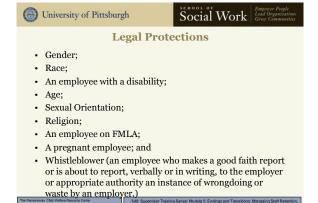
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The Importance of Being Earnest

- Identifies undesirable behavior and gives an employee the opportunity to correct it;

- Serves as notice to the employee that their position may be in jeopardy if behavior does not change; and

- Allows the employee to foresee termination, suspension, or demotion.

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The General Rule for Employment

- Under Pennsylvania common law, employment relationships are "at will," meaning an employer can terminate an employee, or make any other employment decision, for any reason or no reason at all.

- But...

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Common Law vs. Statute

- The Americans with Disabilities Act (ADA)
- The Age Discrimination in Employment Act (ADEA)
- Title VII of the Civil Rights Act of 1964
- The Genetic Information Non-Discrimination Act (GINA)
- The Pregnancy Discrimination Act (PDA)
- The Family and Medical Leave Act (FMLA)
- The Pennsylvania Human Relations Act (PHRA)
- The Pennsylvania Whistleblower Act (PWA)
- The Pennsylvania Workers' Compensation Act (PWCA)
- The Civil Rights Act
- Civil Service Laws
- Labor Laws

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Legal Protections

- Gender;
- Race;
- An employee with a disability;
- Age;
- Sexual Orientation;
- Religion;
- An employee on FMLA;
- A pregnant employee; and
- Whistleblower (an employee who makes a good faith report or is about to report, verbally or in writing, to the employer or appropriate authority an instance of wrongdoing or waste by an employer.)

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How Do They Affect My Decisions?

- Decisions based on an employee's membership in a protected class are prohibited under these statutes.

- Supervisors must be conscientious as to the reasons and support for each and every corrective or disciplinary action, as well as all termination, suspension, and demotion decisions.

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Human Resources Trainings

- *501: The Employee Performance Review Process*

- *533: Beyond the Evaluation: Managing Performance to Increase Caseworker Retentions and Job Satisfaction*

- *533: Supervising Difficult Employees*

- *534: Employee Performance Evaluation*

- *535: Management of Conflict*

- *540: Supervising through HIPAA, FMLA, and ADA and Privacy*

- *540: The Disciplinary Process*

- *703: Legal Issues to Consider in Making Hiring Decisions*

- *703: The Employee Review Process*

- *704: Legal Issues to Consider in Making Firing Decisions*

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Sample Progressive Discipline Policy

- The following progressive disciplinary system will be imposed when an employee violates a company rule or policy or has a significant performance problem:

  - (1) VERBAL WARNING

  - (2) WRITTEN WARNING

  - (3) TERMINATION

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The Legitimate, Nondiscriminatory Reason

- The way to avoid lawsuits is to make termination, suspension, and demotion decisions for legitimate, nondiscriminatory reasons. These include the following:
  - Attendance problems;
  - Performance issues; and
  - Other disciplinary issues.

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What Is HIPAA?

- HIPAA is a federal law that sets rules and limitations on who can disclose what medical information regarding individuals and when.

- Medical information includes any record/letter regarding mental health treatment, substance abuse treatment, physical therapy, hospital visits, doctor visits, etc.

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Protection and Confidentiality of Medical Information

- Medical information must be kept confidential even if it does not contain a medical diagnosis or treatment course or is not generated by a health care professional.

- Keep medical information in a separate file from regular personnel files that is only accessible to designated officials.

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My Employees Keep Asking What Happened to John Doe...

Only if no employer policy around disclosure exists:

- Do not shy away from the question – uncertainty and a lack of communication fosters gossip that may be worse than the actual truth;

- Be sensitive to how any information you may give regarding the separation could impact the departing employee's reputation and/or feelings toward the agency; and

- Do not give the "whole" truth with all the gory details.

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No One is Talking to Me, But They Are Talking to Each Other

- "Root problems" that foster gossip in the workplace:
  - Lack of communication from management, whether it involves good or bad information;
  - Employee ignorance of the consequences of gossip;
  - Lack of respect for management, and/or enforcement of rules by management
  - Competition among employees;
  - Cliques that are allowed to form and congregate regularly;
  - Hesitance by employees to complain about the effects of rumor-mongering; and
  - Uncertainty in the workplace.

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Managing Gossip

- Define what gossip means to your agency, and impose rules based on that definition;

- Reinforce the policy regarding gossip in the workplace regularly with employees;

- Use performance appraisals to address questions of gossip that do not reach the disciplinary levels.;

- Assign more work;

- Educate employees on how they prevent rumors about themselves; and

- Go through the DAPIM™ process and address the "root problems" (APHSA, 2009).

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What Happens If I Get a Reference Call?

- Employers are immune from defamation claims for providing information to a prospective employer regarding <u>job performance</u>, unless the employee can show by clear and convincing evidence that the employer:
  - Disclosed information that they knew was false or should have known was false;
  - Knowingly disclosed materially misleading information;
  - Recklessly disclosed false information; or
  - Disclosed information the disclosure of which was prohibited by law.

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What Happens If I Get a Reference Call? (continued)

- Confirm dates of employment, job title, and rate of pay.

- Eligibility for rehire.

- Negotiate with the employee regarding a standard reference letter to be provided in response to a reference request.

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- Educational Supervision

- **Clinical Supervision**

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Burnout and Secondary Trauma - What's the Difference?

- Both issues have similar roots. Both issues involve the cumulative effects of stress. Both issues elicit similar responses from affected employees.

- While secondary trauma deals with secondary exposure to clients' trauma, burnout adds the daily stressors of functioning in the overall workplace.

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"The fact is that people are good. Give people affection and security, and they will give affection and be secure in their feelings and their behavior. "

- Abraham Maslow

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What is This?

- Our exposure to secondary trauma is a process that occurs from ongoing, repeated exposure to trauma, suffering and tragedy.

- The effect will be cumulative, like exposure to radiation.

- It happens to employees as they are exposed to cruelty, grief and loss over time. It creates discernable changes in the employees in their physical health, psychological health and spiritual well being.

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Why Does This Happen?

- Secondary trauma occurs because your employees care about those they serve. The employees feel committed to and responsible for helping those they serve.

- Secondary trauma occurs because the employee's long-held beliefs about institutional justice, religion and/or personal vulnerability are placed under attack.

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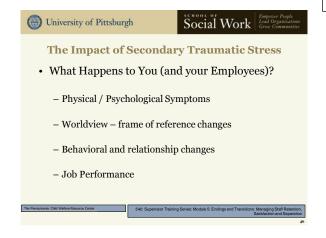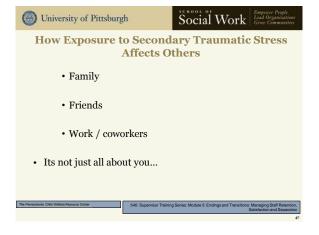
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Who is Most at Risk?

- People who tend to avoid problems or difficult feelings;

- Employees who have personally experienced trauma;

- People whose work is their whole life;

- People with no strong social support network;

- People with increased exposure to intense traumatic stress (primary or secondary);

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Who is Most at Risk? (continued)

- People without a strong sense of purpose, hope or meaning in their lives;

- People experiencing high levels of stress/other problems in their lives;

- Inexperienced humanitarian workers; and

- Those who actively engage children and families in their work.

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The Impact of Secondary Traumatic Stress

- What Happens to You (and your Employees)?

  – Physical / Psychological Symptoms

  – Worldview – frame of reference changes

  – Behavioral and relationship changes

  – Job Performance

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How Exposure to Secondary Traumatic Stress Affects Others

- Family

- Friends

- Work / coworkers

- Its not just all about you…

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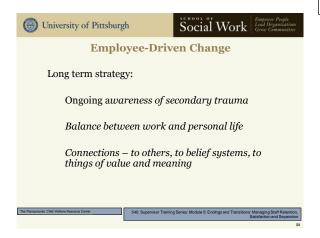
Assessing the Impact on Those that Support Us

- Have you noticed the way I behave and appear to be different when I'm under pressure?

- Do I seem to be acting that way increasingly more and more of the time?

- What ways do you think my work is impacting me during the last week or year?

- From your point of view, how does this impact you or other people that I care about?

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Assessing Risk and Impact

- The Professional Quality of Life Scale (PROQOL) – B. Hudnall Stamm

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Making a Secondary Trauma Action/Self Care Plan

- Understanding the three areas of focus will enable us to develop successful strategies for coping with and transforming secondary trauma.

  They are:
  - External locus of control
  - Internal locus of control
  - Support systems

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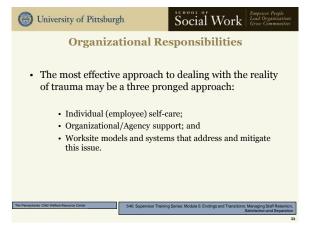
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Strategy for Making a Secondary Trauma Action/Self Care Plan

- When we couple our understanding of the impact of secondary trauma with our understanding of the options for coping, we can develop a plan for effectively dealing with this issue.

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Employee-Driven Change

Long term strategy:

Ongoing awareness of secondary trauma

Balance between work and personal life

Connections – to others, to belief systems, to things of value and meaning

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Organizational Responsibilities

- The most effective approach to dealing with the reality of trauma may be a three pronged approach:

  - Individual (employee) self-care;
  - Organizational/Agency support; and
  - Worksite models and systems that address and mitigate this issue.

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Trauma-Informed Care

An approach to engaging people with histories of trauma that recognizes the presence of trauma symptoms and acknowledges the role that trauma has played in their lives.

(National Center for Trauma-Informed Care)

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The Supervisory Role – Prevention and Intervention Strategies

The supervisor's role will begin with:

- developing a vision of how the employees will deal with trauma, personally and agency-wide, on an ongoing basis;

- designing and building the systems needed to make that happen; and

- creating a safe and trusting environment for the employees that incorporates the parallel process.

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The Next Step in Professional Growth and Development

- Having built the foundation for being an effective supervisor, what do you see as the next step in your professional development?

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The Learning Cycle

Assess Learning Needs
Identify Learning Methods
Prepare for Learning
Experience Learning
Apply Learning
Feedback

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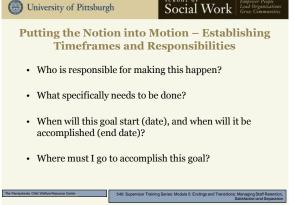
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Can You See Where This Will Lead?

- When you achieve these goals, what personal and worksite results will you see as a supervisor?

- How will accomplishing these goals impact your working relationship with your employees?

- Will accomplishing these goals create a launching pad for the next step in your professional development?

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Putting the Notion into Motion – Establishing Timeframes and Responsibilities

- Who is responsible for making this happen?

- What specifically needs to be done?

- When will this goal start (date), and when will it be accomplished (end date)?

- Where must I go to accomplish this goal?

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Congratulations!

You are now a certified supervisor!

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