

Lunch and Learn Series:

Finding the Instructor Voice

Foundations of Supervision (FOS) Module 2: Supervisory Roles and Professional Boundaries: Simulation #1 Case Summary and Goals

([Full FOS 2 Instructor Guide](#))

Case Summary

You were recently promoted to a supervisor within your ongoing unit. You have been with the agency for six years, where you began as a caseworker. You will now be supervising Rowan, with whom you have a strong friendship.

You and Rowan have been friends for six years, since you both started at the agency as caseworkers. You have supported each other through personal and professional challenges. Together you have coped with high caseloads and turnover, changes in policy, legislative updates, and changes in administration.

Since taking the supervisor position two weeks ago you were congratulated by Rowan but have not spent time with them outside of work, which is not unusual due to your hectic schedule. Rowan sent you a congratulatory text and asked you to get together to celebrate. You responded that you would look at your schedule and get back to them.

While you continue to consider Rowan a dear friend, you know you need to talk to Rowan about your promotion and how it affects your personal and professional relationship.

Simulation Goals

- Identify the boundary issue(s)
- Acknowledge the boundary issue(s)
- Assess how the issue impacts the relationship by applying emotional intelligence components (see HO #13 for the Emotional Intelligence components)
- Resolve the issue(s) by:
 - Identifying goals for the relationship
 - Redefining clear expectations for your relationship with Rowan
 - Ensuring Rowan understands how the issue impacts the relationship and your role within the unit

Application Activity #6 as a transition between simulations:

Since your conversation with Rowan Hughes about boundaries related to your promotion to supervisor, you have engaged respectfully and professionally with Rowan on numerous occasions related to case progress and needs.

Yesterday another supervisor came to you with a concern about Rowan. She stated that another caseworker approached her with something Rowan had stated about your relationship. The caseworker relayed that Rowan said, “Being supervised by them is going to be so easy. Since we are really close friends, they won’t be breathing down my neck all the time like my last supervisor. Hopefully, I’ll finally start getting some easier cases, too.”

- #6) Using the case information provided, and your experience with Rowan in the first simulation, create an introduction to address the concerns about boundaries with Rowan. Complete your introduction in three lines or less.

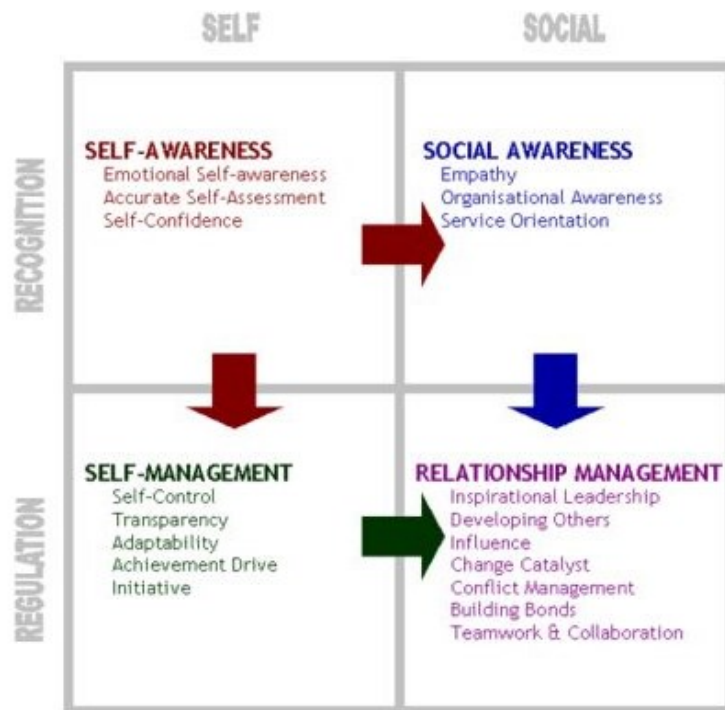
Simulation 2

Case Summary

- Following your conversation with Rowan about boundaries related to your promotion to supervisor, you have engaged respectfully and professionally with Rowan on numerous occasions related to case progress and needs.
- Yesterday another supervisor came to you with a concern about Rowan. She stated that another caseworker approached her with something Rowan had said about your relationship. The caseworker relayed that Rowan said “Being supervised by them is going to be so easy. Since we are really close friends; they won’t be breathing down my neck all the time like my last supervisor. Hopefully I’ll finally start getting some easier cases, too.”

Simulation Goals

- Identify the boundary issue(s)
- Acknowledge the boundary issue(s)
- Assess how the concern impacts the relationship by applying emotional intelligence components, such as self-awareness, empathy, and relationship management:



- Resolve the issue(s) by:
 - Identifying goals for the relationship
 - Redefining clear expectations for your relationship with Rowan
 - Ensuring Rowan understands how the issue impacts the relationship and your role within the unit

Responses/resistance to boundaries from participants have included (from real life and in simulation):

- We'll be fine and won't have problems
- We don't need to change anything
- They won't do anything wrong to put us in a difficult spot
- They respect me, it'll be okay
- Rowan didn't mean anything bad so it's okay
- We just won't talk about our friendship at work

- We only get together outside of work
- We don't talk about work when we get together
- We're a small county, so we have to be friends
- I'm not going to stop being friends with them
- There's no reason we can't keep being friends as we always have
- They can't expect me to give up a friendship for the job
- They knew we were friends when they promoted me
- I don't want to hurt their feelings
- I want Rowan to be happy and not mad at me
- I'm not going to suddenly be mean to everyone
- It's okay if no one knows. We're not hurting anyone that way
- Our intent is what matters

As an experienced professional, you know that the change from caseworker to supervisor requires corresponding changes in professional and personal boundaries with people who were peers and are now supervisees. All of us have experienced the power of storytelling in our own cultures and families as well as the impact formal and informal storytelling can have in driving agency culture.

Consider how a practice example (a professional 'story') may be helpful for this training situation.

In our meeting we will explore:

- WHY - intentional instructional purpose
- WHEN - in the instructional sequence
- WHAT - the content you choose to include / exclude
- HOW - the way in which you tell the story