

Ohio Child Welfare Training Program

Supervisor Checklist

Strategies for Transitioning

Into Supervision

June 2015

Written by the Institute for Human Services for the
Ohio Child Welfare Training Program and
The Ohio Department of Job and Family Services

Strategies for Transitioning Into Supervision

This checklist is designed to assist supervisors in developing strategies for moving up within an organization, supervising former peers, supervising ‘friends’, supervising a unit with seasoned staff persons, and other transitional issues commonly encountered by new supervisors.

Supervising former co-workers (peers) – moving up in the unit where you were formerly a caseworker

- Clarify your expectations. Describe your leadership philosophy and clarify your ‘open door’ policy – your availability for emergency and non-emergency situations.
- Recognize that you have to prove your expertise all over again.
- Remember that respect has to be earned, it doesn’t come with a title.
- Recognize you may now be excluded from lunches and other special outings, that there might be tension in the air when you walk into the work area, or that you might be teased with comments like, “You’re management now.”
- Don’t flaunt or abuse your ‘power’ or authority.
- Build trust and credibility: do what you say you will do!
- Other actions:

Supervising “Friends”

- Separate friendship from your position. Remember there may be times when you have to step up and use your authority.
- Redefine and/or re-establish roles; be forthright. Ask for mutual understanding from the start: that you won't take advantage of the friendship and neither will they.
- Set and maintain clear boundaries.
- Scrutinize your assignments/treatment of them as others will be watching for evidence of 'favoritism'. Their perception is their reality. Be vigilant to make certain you are being objective and fair.
- Use organizational policies to maintain fairness – i.e., first come, first approved for vacation.
- Be sensitive. Your presence can be particularly meaningful during stressful times. Do the same for all members of your work group, not just your friend.
- Be discreet. Do not share confidential information with your friend, no matter how much you trust him/her.
- Don't take advantage of your friendship by giving your friend harder cases just to prove there is no favoritism.
- Be fair in your feedback and evaluations. Don't let your fondness for your friends color your judgment of their work.
- Avoid sharing disproportionate amounts of your day or lunch hours with your friends.
- Be open. Encourage your friend to tell you when you're making a mistake or are ticking people off.
- Don't ask your friend to tell you about what's going on with others in the work unit or to 'spy'.
- Be prepared: some friendships may cool. Supervising a friend can strain a relationship.
- Don't strive to become personal friends with all your supervisees. It's better to be friendly, positive, approachable, concerned, respectful, and consistent with all supervisors.

- Use discretion. Remember you are truly never off duty. Your behavior at social events is part of your leadership profile.
- Develop new friendships with your new peers. Don't discard the old, make room for everyone.
- Be up front with your friends – if they say something hurtful, tell them. If someone is bitter about your accepting the new position, cannot renegotiate new roles, or expects special consideration because of your friendship, they are probably not a good friend anyway.
- Other Actions:

Supervising seasoned people (on the job longer than you) and/or coming into a unit where you are unfamiliar with the work

- Develop a personal plan for professional development focusing on position-specific skills.
- Don't assume they all wanted the job or were not qualified for the position.
- Be honest about what you do and do not know.
- Accelerate your personal learning.
- "Shadow" your workers to become familiar with their jobs.
- Acknowledge your personal learning needs and share you plan for developing competence in this work area. Determine (and share with staff) how the staff's need for consultation and decision-making will be met while you are learning.
- Acknowledge and validate their feelings about you coming into the unit.

Use their expertise to help you, but don't expect them to train you in all aspects of the work. Get this elsewhere.

Other Actions:

Being accepted by your new peer group

Recognize you might not be immediately included by your new peers, that you can't always make everyone like you. As with the development of any new relationship, this will take time.

Recognize that your opinions may not be asked for, or if given, not have the same weight.

Become competent in your new role. Do your job to the very best of your ability – this will earn their respect.

Don't be too pushy or abrasive, but invite your new peers to lunch.

Have confidence that you belong; give people time to accept you in your new role.

Act like a manager; dress like a manager; be positive; and be professional.

Other Actions:

Getting the supervision YOU need

- Recognize their broader scope of responsibilities, but also accept that you have the right to receive appropriate supervision.
- Ask the person for their expectations of YOU and your work group. Discuss unit and department mission, strategic plan, goals and outcomes. Ask about performance expectations and standards, and set a first 6 months goals plan.
- Take the initiative and ASK for regular meetings. Make them a priority. If your supervisor has to cancel a meeting with you, ask for the meeting to be rescheduled as quickly as possible.
- Find a mentor who can help you with those organizational issues that are not immediate supervision.
- Other Actions:

Dealing with others in the unit who applied for the position

- Consider setting up meetings with staff who applied to discuss the situation and their feelings.
- If anyone is upset or angry that they were not chosen, deal with the ‘elephant in the room’. You can say something like, “I know you applied for the position, and for whatever reason, I was chosen. I’m sure you’re disappointed, but we have objectives to achieve and need to find a way to work together. What are your thoughts on how we can best do this?”
- Acknowledge and validate their feelings, i.e., “I would probably feel the same way if the situation was reversed.”
- Ask for their help and support.
- Other Actions:

Discomfort with being “caught” in the middle

- To deal with this issue, some new supervisors over-align themselves with their workers.
- Could result in poor quality of work or management perceiving them as not supportive and/or poor leader
- Recognize where your loyalties now lie – you can be an advocate for your staff, but your greater loyalty is now to management.

If you disagree with a management decision – ask for reasons why the decision was made, express your thoughts, then support the decision.

Other Actions:
