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**TRAINING
INSTITUTE**
PEOPLE INCORPORATED
MENTAL HEALTH SERVICES

Boundaries in Supervision

9.12.22

Presented by Russ Turner, MA, MS, Director

Class time

8:30AM-9:45AM



General: Training@PeopleIncorporated.org

Instructor: Russ.Turner@PeopleIncorporated.org

Thank you for joining us!

Talking about boundaries with staff

PART ONE

Boundaries

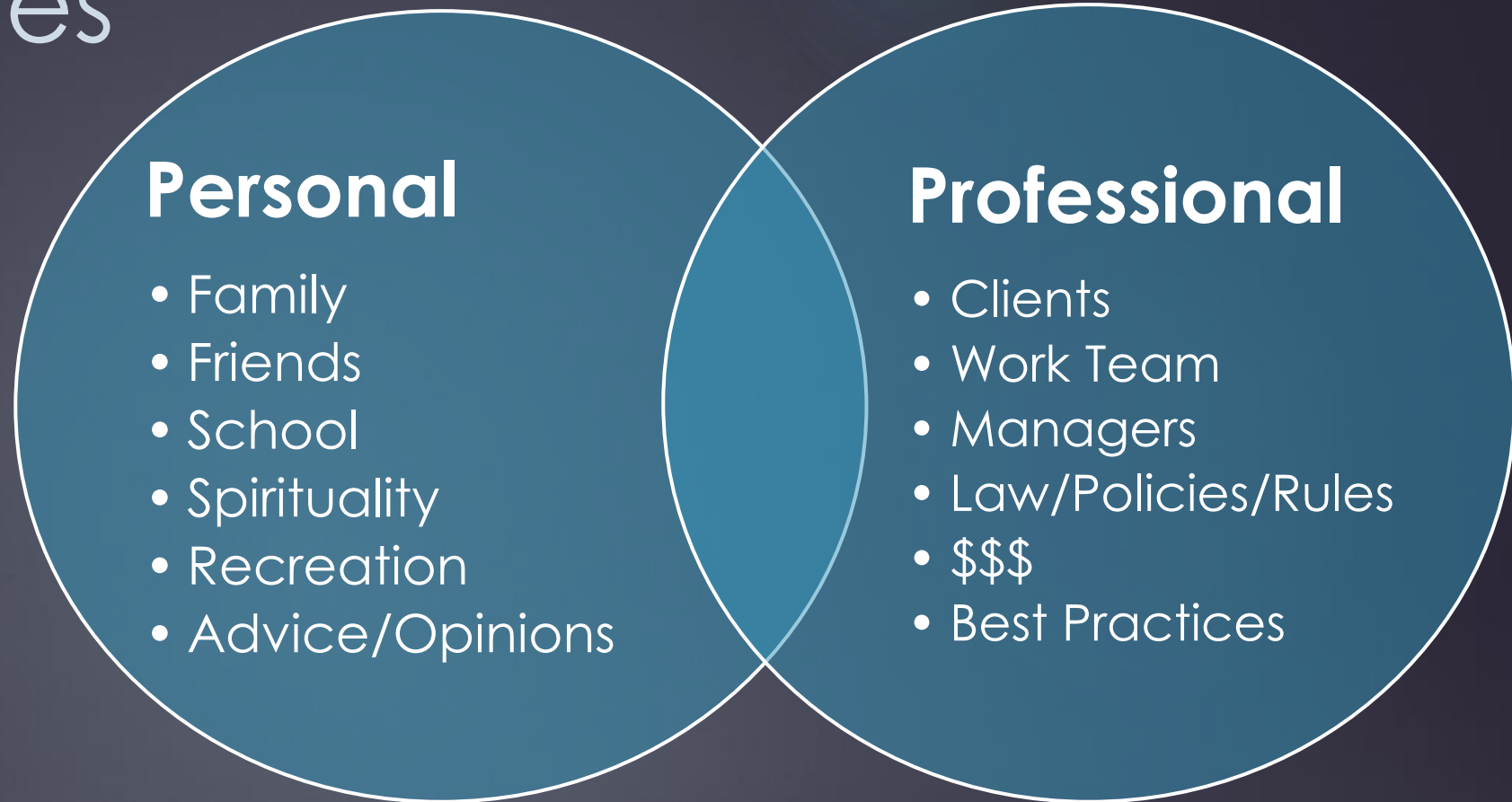
Things that indicate or set limits

- ▶ A physical space or divider between people or things
- ▶ Protocols that promote professionalism/respect/safety
- ▶ Role differentiation
- ▶ Work “rules” about what should/should not be done/talked about etc.



Boundary Issues

...arise when there's an actual, potential for, or appearance of a conflict of interest between personal and professional life



“...be alert to and avoid conflicts of interest that **interfere with the exercise of professional discretion and impartial judgment.**”

Reamer, 2018

Opening thought

“If you don’t establish boundaries, the other person will assume what they are and make them for you”

Source: Katherine, 1991

Moving toward supervision

PART TWO

Leadership

► You need to be

respected

more than liked



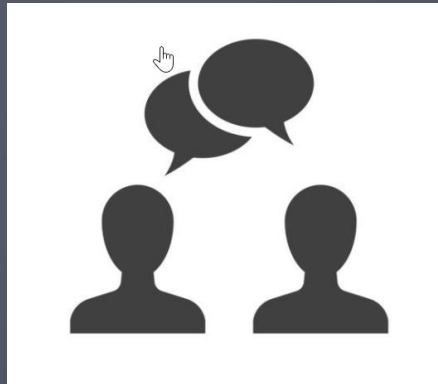
Opening thought

“A lack of boundaries invites a lack of respect”

Source: Unknown



- *“I need this accommodation, and I need it now. These are the reasons it’s important and I need it now.”*



“Everything in us presses toward decision, even toward the wrong decision, just to be free of the anxiety that precedes any big step.”

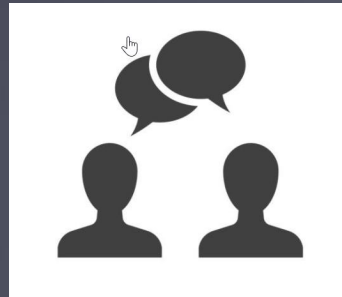
Source: May Sarton

Source: May Sarton

Boundary skills with staff

PART THREE

*I really need to know
right now because
blah blah blah*



*This is taking WAY
too long and this is
really bad for me
because blah blah*

*It sounds like the
challenge is
timing*

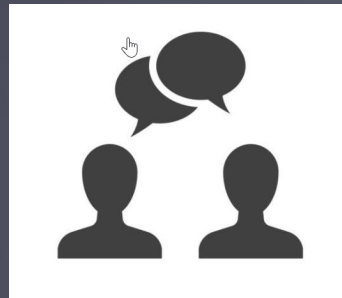
*I can see that
you're frustrated
and in a bad spot*

Boundary Skill



Take your time

Come on Russ! You know I've got a lot of stuff going on right now!



You, of all people, should be able to understand – you're a parent too. You get it, right?

Help me understand a little more about the situation

Yes, I understand. My role here is to consider the effects of decisions like this on the team, our clients

Boundary Skill

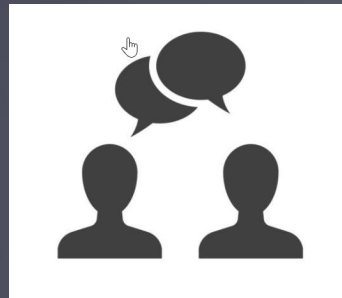


Clarify your role

Clarifying role example

- ▶ My ultimate responsibility is the success and sustainability of the Training Institute at People Incorporated
- ▶ I care about my staff, but their health and wellbeing and personal lives are their responsibility
- ▶ In addition, I have 4 staff, so overly focusing on one can create issues with the others
- ▶ ***“What can I do, as your manager, to help you out?”***

My partner has this thing going on right now and so I need to leave early on Thursdays and Fridays in the afternoons because I need to pick up my kids from daycare etc...



Thanks for bringing this to my attention. It sounds like you're requesting a work accommodation. Please put this exact request in writing (in email). I will review it, consult if necessary, and get back to you within 48 hours

Boundary Skill



Follow a process

Decision-making process

1. Define the boundary issue
2. Check your biases
3. Clarify your role
4. Seek consultation
5. Communicate the decision
6. Follow through

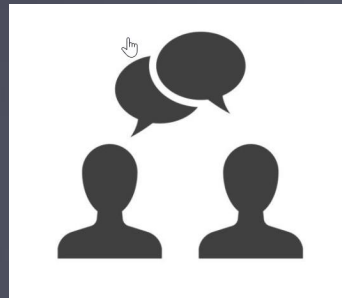
What and who is at risk?
What's the conflict of interest?
Is there a dual relationship?

Boundary Skill



Follow a process

Come on Russ, you need to cut me some slack! Me and you go back ages. I thought we were friends!



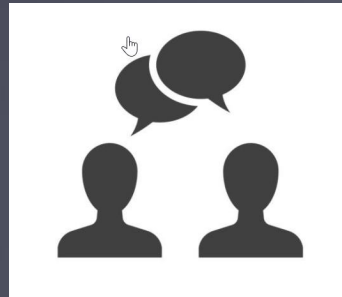
Help me understand what you mean by “cut me some slack” – what is the exact request you want me to work on here?

Boundary Skill



Unpack Stock Language

Come on Russ, you need to cut me some slack! Me and you go back ages. I thought we were friends!



I know it's weird, but my role has changed, and I need to follow a process

Boundary Skill

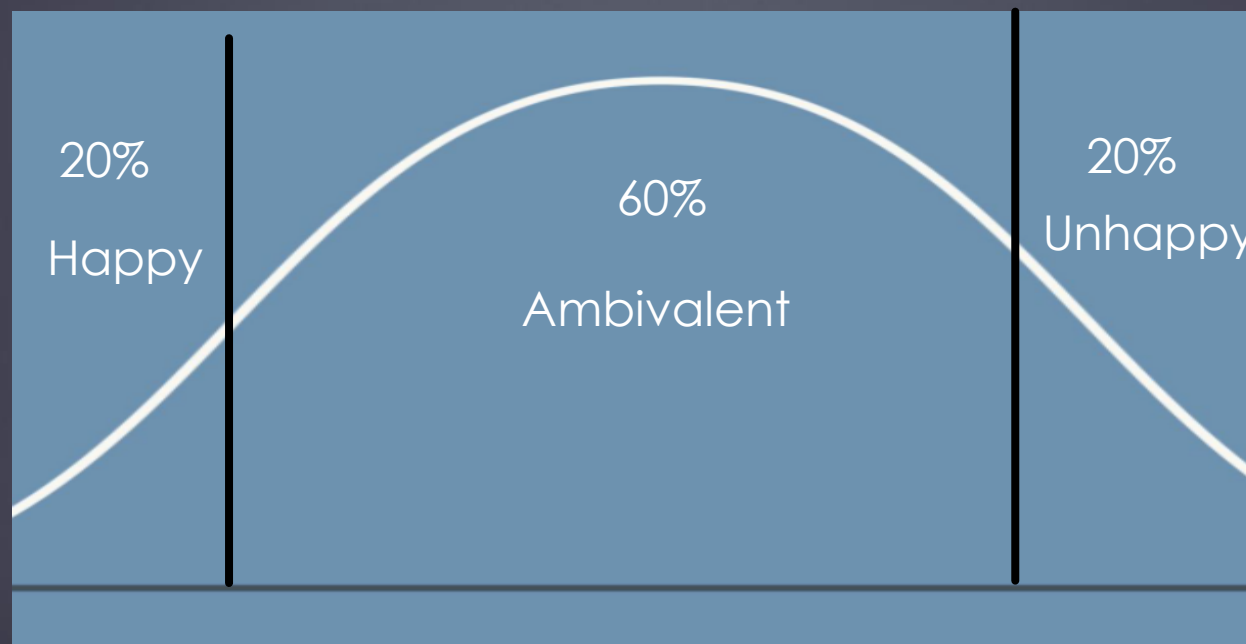


Manage
Former Peers
and Dual
Relationships

Leading former peers

90 days

- It will feel emotional



Where are you going to put your focus?

Source: Tom Henschel

1:1 with all new direct reports

- ▶ Schedule the meeting
 - ▶ Show up like a leader
- ▶ The staff in the 20% who have an issue, that is their issue not yours
 - ▶ Don't take it personally, this is a key boundary
- ▶ Have a conversation
 - ▶ I'm gonna be your supervisor, tell me how you're feeling about it?
 - ▶ Listen, there will be feelings there
- ▶ Tell them how you'll be doing things

Boundary Skill



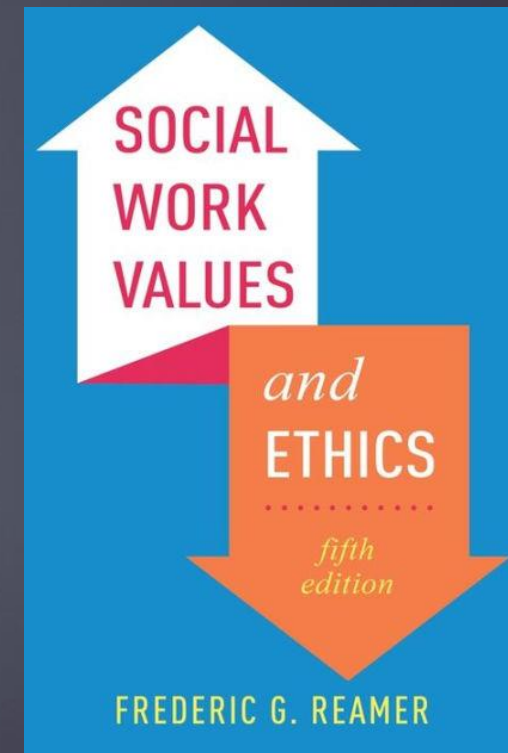
Manage
Former Peers

Seven things to ask the people you'll be leading

1. *How did you come to work here?*
2. *Tell me what you do for the team?*
3. *What's working for the team and what isn't?*
4. *How does this job fit into your career objectives?*
5. *What keeps you busy outside of work?*
6. *What advice do you have for me about how to work with you?*
7. *If I ever have an issue with something you're doing, what is the best way to tell you?*

Identify any dual relationships

“Supervisors should avoid dual relationships that have the potential to interfere with the quality and objectivity of their supervision.”



Lean on others with more experience

- ▶ Your supervisor
- ▶ Other supervisors, similar role
- ▶ Human Resources
- ▶ Legal and Compliance
- ▶ Others?

Tell the staff person you'll be consulting with others on your decision

Boundary Skill

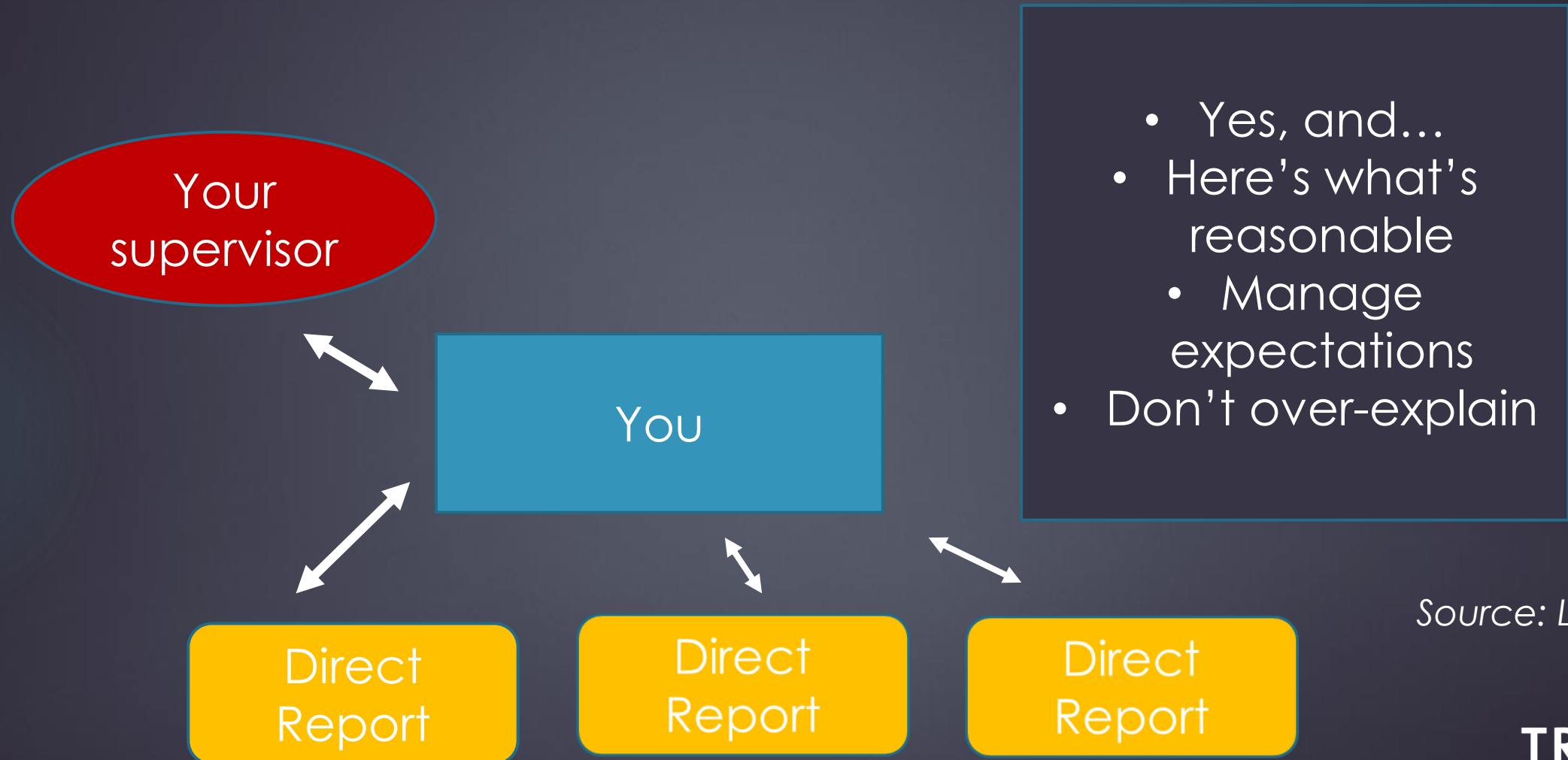


Seek
Consultation

Boundary skills with superiors

PART FOUR

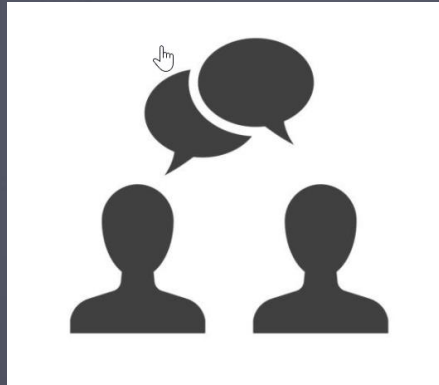
Create boundaries by saying “no”



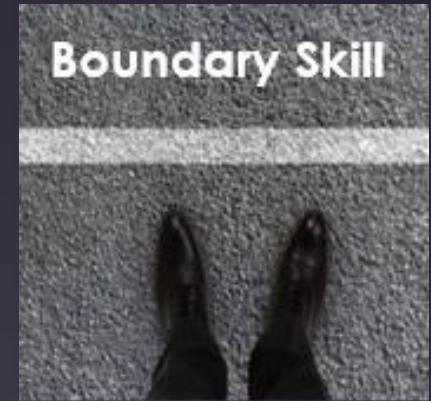
Source: Lois Frankel



From HR: “This employee must have these accommodations”



“The role of X requires that the employee be able to do A, B, C, and D. If they are unable to perform these functions, I can’t use them in this role.”



Identify
essential
elements of
staff's role

Tip:

Don't transition with "BUT" or "HOWEVER"
Use – "The Problem is"

Boundary Skill



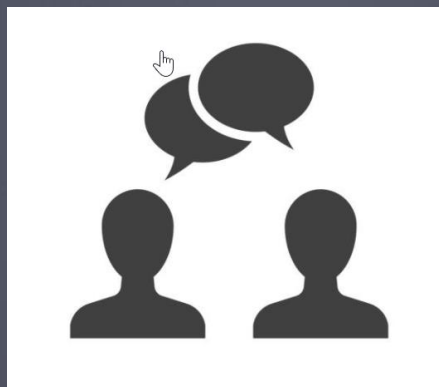
Explain "the problem"

The problem is, for me to keep an employee fully employed in this role they need to do function A, B, C, and D. I could employ them part time, or we can furlough them. What do you want me to do?

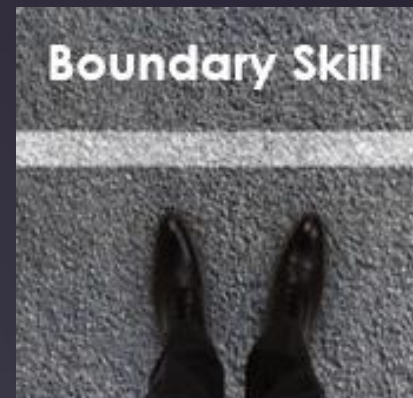
Source: Kwarme Christian



"I need this report by 5pm today"



"The role of X requires that the employee be able to do A, B, C, and D. If they are unable to perform these functions, I can't use them in this role."



Use YES, and...

Tip:

Don't transition with "BUT" or "HOWEVER"
Use – "The Problem is"

Boundary Skill



Explain the
problem

The problem is, for me to get you a good report, I need a bit more time. I can get you a rudimentary summary report by the end of the day. If you could give me another 24 hours, I can add supporting data and graphics to make it really robust. What do you want me to do?

Source: Kwarme Christian

Tip:

Clarify: “What does ‘done’ look like?”

*What do you need it for? Who are you
going to be presenting it to and
when?*

Boundary Skill

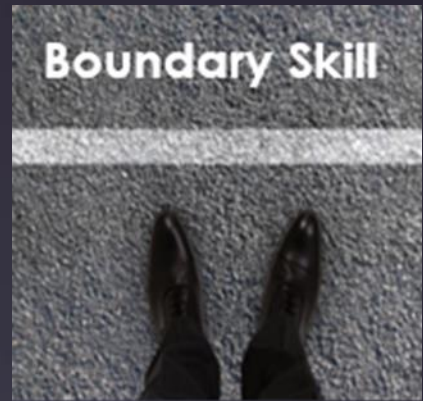
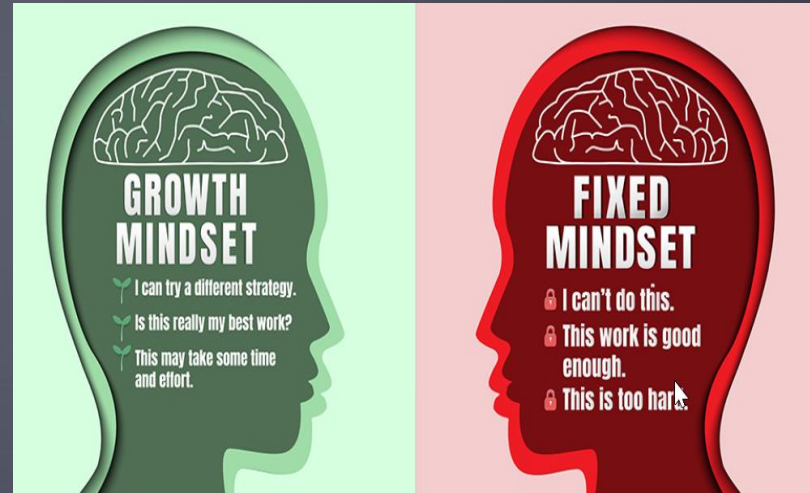


Clarify
parameters

Source: Brene Brown

Preparing for the conversation

- ▶ Recognize what the challenge is
 - ▶ Usually, it's your mentality
 - ▶ What is your focus on?
- ▶ Think through
 - ▶ What's the other person thinking?
 - ▶ What is the goal of the conversation?



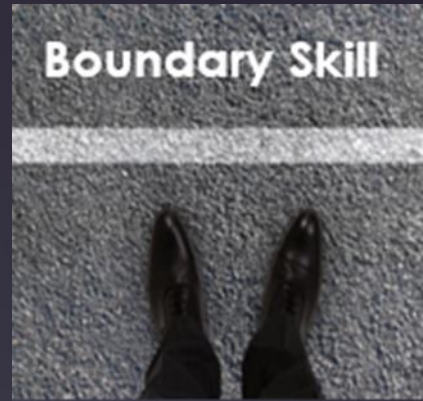
Prepare for
difficult
conversations

Preparing

- ▶ 1. What is your purpose for the convo?
 - ▶ *What do you hope to accomplish? What would be an ideal outcome?*
- ▶ 2. What assumptions are you making about intentions?
 - ▶ *Watch for your feelings here*
- ▶ 3. What “buttons” of yours are being pushed?
 - ▶ *What personal history is being triggered?*
- ▶ 4. How is your attitude toward the conversation?
 - ▶ *Adjust if necessary*
- ▶ 5. Who is “the opponent”?
 - ▶ *What are they thinking?*
- ▶ 6. What are your needs and fears
 - ▶ *Adjust if necessary*

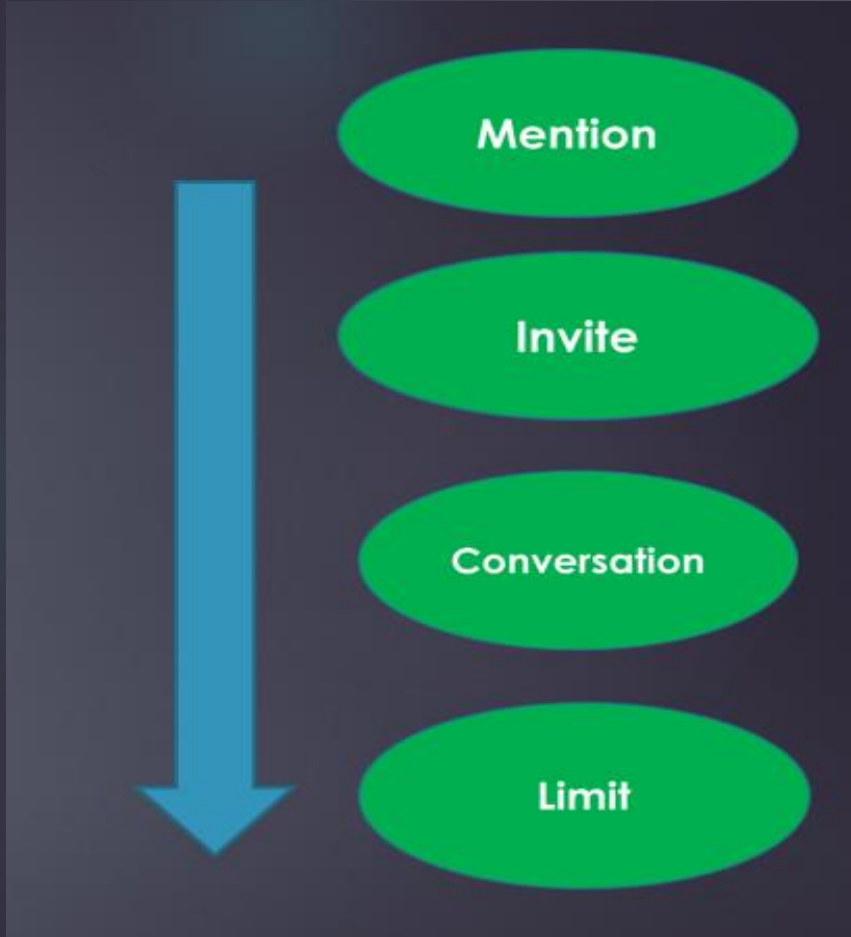
Source: Judy Ringer

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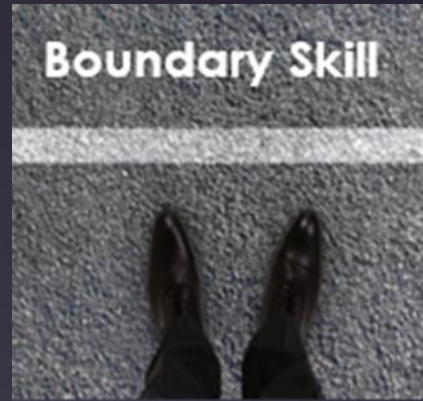


Prepare for
difficult
conversations

Create accountability



Source: Jonathan Raymond



Use a Process

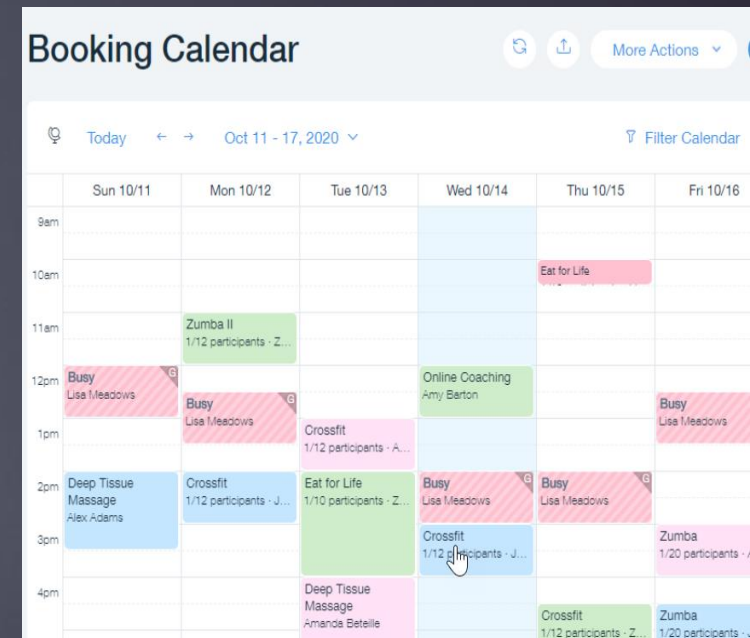
Mention

- ▶ **Mention** it first
- ▶ Include positive too here
 - ▶ “Hey, I wanted to mention...”
 - ▶ “I’ve noticed...”



Invite

- ▶ Formal **invitation** to talk about it
- ▶ Best is an existing meeting
- ▶ Regular 1:1 would be ideal



Conversation

- ▶ 1. Be open
 - ▶ *Spirit of inquiry, you don't know anything*
- ▶ 2. Acknowledge
 - ▶ *Show that you have heard and understood*
- ▶ 3. Focus on solutions
 - *Don't reject "systems" solutions*
- 4. Keep the framing about the work
 - *Talking personally but not personal*
- 5. Clarify
 - *Your position without minimizing theirs*
- 6. Empower
 - *They brainstorm solutions and continue inquiry. Here's where you are, here's where I need you to be*

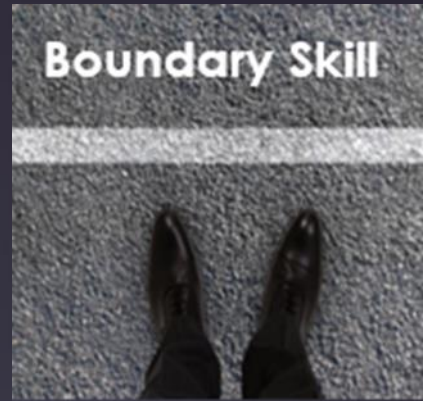
Boundary Skill



Clarify input
versus decision

The Limit

- ▶ The basic limit is whether or not the person should stay on your team or organization
- ▶ Keep a long-term view in mind
- ▶ This part is short (5 mins)
- ▶ *“Here’s what I need from you in the next 3 days. If I don’t see it, I’ll take you off this project and put you on another one”*



Explain basic limits

Don't overexplain!

Communicate the decision

Clear is kind

My partner has this thing going on right now and so I need to leave early on Thursdays and Fridays in the afternoons because I need to pick up my kids from daycare etc... I can come in earlier to make up the time.



While I understand that you have a tricky situation with picking up your kids, it's not possible for you to leave your shift early because then the program is understaffed at those times which puts us in violation of program rules.

One option is to change your shift to the morning. This might be possible; do you want me to look into it?

Opening thought

“If you don’t establish boundaries, the other person will assume what they are and make them for you”

Closing thought

You don’t get to look good and grow at the same time

Sources

▶ **Kwame Christian**

- ▶ Director, American Negotiation Institute
- ▶ Author, Finding Confidence in Conflict



▶ **Ben Brearley**

- ▶ Leadership Coach
- ▶ ThoughtfulLeader.com



▶ **Judy Ringer**

- ▶ Author, Organizational Trainer, Coach
- ▶ Author, Turn Enemies into Allies



▶ **Tom Henschel**

- ▶ Executive Coach
- ▶ Podcast Host: "Look and Sound of Leadership"



▶ **Jonathan Raymond**

- ▶ Executive Coach, Leadership Trainer
- ▶ Author, Good Authority



Additional Learning

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