

Directions:

As a team, for each of your scenarios, identify:

1. What eLearning topics may be helpful to keep in mind?
 - a. Civil Service Rules and Labor Relations
 - b. Hiring Practices
 - c. Pay, Leave and Time
 - d. Performance Plans and Reviews
 - e. Resolving Performance Issues
 - f. Unlawful Employment Discrimination
2. What steps will you take? (List all steps needed for each person involved in the scenario. If the scenario does not specify whether the individuals involved are represented or non-represented, have each person in your group share how they would respond, based on whether their direct reports are represented or non-represented.)
3. Who will you involve?
4. What tools and resources that we have explored in Leading Others will you use?
5. Thinking about your own work environment:
 - a. Which tools and resources have you already implemented, which may be helpful if you ever face this situation?
 - b. Which tools and resources will you implement once you are back at work, which may be helpful if you ever face this situation?

If you have questions for a human resources (HR) professional, consider asking the HR Consultant in the room.

Prepare to report out on your group's scenario and responses with the larger class.

Leadership Scenario Template

1. **What eLearning topics may be helpful to keep in mind?**

2. **What steps will you take? (List all steps needed for each person involved in the scenario. If the scenario does not specify whether the individuals involved are represented or non-represented, have each person in your group share how they would respond, based on whether their direct reports are represented or non-represented.)**

Leadership Scenario Template

3. Who will you involve?

4. What tools and resources that we have explored in Leading Others will you use?

5. Thinking about your own work environment:

a. Which tools and resources have you already implemented, which may be helpful if you ever face this situation?

b. Which tools and resources will you implement once you are back at work, which may be helpful if you ever face this situation?

Leadership Scenario #1

1. You just started in a new position with new direct reports. The supervisory desk files you received when you started this job are full of documents going back a couple of years. In fact, you noticed last week that the supervisory file for one of your employees, Erik, has several medical documents in it, describing various health diagnoses and conditions he has. While walking by Erik's cubicle, you notice he appears to be sleeping at his desk.

What eLearning topics may be helpful to keep in mind?

Possible responses may include:

- Performance Plans & Reviews
- Civil Service Rules & Labor Relations
- Resolving Performance Issues
- Pay, Leave, & Time
- Unlawful Employment Discrimination

What steps will you take? If the scenario does not specify whether the individuals involved are represented or non-represented, have each person in your group share how they would respond, based on whether their direct reports are represented or non-represented.) Possible responses may include:

- Wake Erik up by calling his name. Ask if he is unwell/needs to go home. (Separate stopping the behavior from disciplining.)
- **Stress this: Take all medical documentation out of Erik's supervisory desk file and give to HR!** (This was in the eLearning.)
- Find out from HR if Erik has a current or pending reasonable accommodation request.
- Have conversation with your manager and HR about next steps.
- Review applicable Civil Service Rules and agency policy. (Note: ELearning modules and Civil Service Rules do not talk about supervisory files, but the CBAs do.)
- Schedule meeting with Erik. Share the behavior you saw and ask for his side of the story. Listen. Identify whether steps for reasonable accommodation may need to take place. Clarify expectations. Document. Schedule follow-up. Consider a referral to EAP.
- Review all supervisory desk files for direct reports; remove all documentation older than a year unless issues are still occurring. Take any other medical documentation to HR.
- If Eric is overtime eligible, is it worth considering whether he is on his break? If yes, does supervisor want to ask him to take break times outside the work area?

Who will you involve? Possible responses may include:

- Erik and your manager
- HR staff and possibly labor resources
- Possibly EAP

Leadership Scenario #1

What tools and resources that we have explored in Leading Others will you use?

Possible responses may include:

- Creating a safe environment
- Self-awareness
- Styles and values
- Communicating as a leader, advocacy and inquiry
- Listening
- Planning to communicate/3C model
- Coaching
- Preparing for conflict situations
- Giving and receiving feedback

Thinking about your own work environment:

- **Which tools and resources have you already implemented, which may be helpful if you ever face this situation?** Answers will vary, but anything learners have done to set expectations, better understand team members, and build trust will likely be helpful.
- **Which tools and resources will you implement once you are back at work, which may be helpful if you ever face this situation?**
- Possible responses may include:
 - Understand their own and their direct reports' communication styles
 - Practice communicating and listening
 - Practice planning for conversations with the 3C model
 - Practice coaching with the GROW model
 - Ensure performance expectations are documented and revisited regularly

What if? If learners finish early, ask them: How would your answers change if Erik was on your colleague's team, and not yours?

- Possible responses may include:
 - As a leader, it still may be appropriate to address/stop the behavior. Contact your colleague about what you observed and how you addressed it.

Leadership Scenario #2

2. Three members of your team, Leena, Conway, and Kai, are working on a project that needs to be done in time for an 8 am meeting tomorrow. Leena and Conway are union-represented, Leena is overtime eligible, and Conway is overtime exempt. Kai is not union-represented, and is overtime exempt. It is close to 5 pm, when the three of them usually leave the office for the day (they all work 8-5). The project is not yet complete.

What eLearning topics may be helpful to keep in mind?

Possible responses may include:

- Performance Plans & Reviews
- Civil Service Rules & Labor Relations
- Pay, Leave, & Time

What steps will you take? If the scenario does not specify whether the individuals involved are represented or non-represented, have each person in your group share how they would respond, based on whether their direct reports are represented or non-represented.) Note: Since the scenario specifies each employee's representation status, learners should address based on information provided.

Possible responses may include:

- The team may have faced this situation before.
- If the team has never faced this situation before, and clarification is needed, clarify:
 - Leena is overtime eligible. If she is not approved for overtime, she needs to leave at the end of her work shift (5 pm).
 - Conway and Kai are overtime exempt. They may stay after 5 to continue the project, or come in early to finish. Some agencies have internal policies also allowing supervisors to work with staff to help them adjust schedules within the week or pay period.

Who will you involve?

Possible responses may include:

- Leena, Conway, and Kai
- Your manager
- HR staff
- Possibly labor resources

Leadership Scenario #2

What tools and resources that we have explored in Leading Others will you use?

Possible responses may include:

- Creating a safe environment
- Self-awareness
- Styles and values
- Communicating as a leader, advocacy and inquiry
- Listening
- Planning to communicate/3C model
- Coaching
- Preparing for conflict situations
- Giving and receiving feedback

Thinking about your own work environment:

- Which ones have you already implemented, which may be helpful if you ever face this situation?
Answers will vary, but anything learners have done to set expectations, better understand team members, and build trust will likely be helpful.
- Which ones will you implement once you are back at work, which may be helpful if you ever face this situation?
- Possible responses may include:
 - Understand their own and their direct reports' communication styles
 - Practice communicating and listening
 - Practice planning for conversations with the 3C model
 - Practice coaching with the GROW model
 - Ensure performance expectations are documented and revisited regularly
 - Review applicable rules/CBA and agency policy

What if? If learners finish early, ask them: How would your answers change if Leena, Conway, and Kai are all overtime eligible?

- Possible responses may include:
 - Find out whether program is able to authorize overtime
 - Find out whether staff are available to do overtime

Leadership Scenario #3

3. Sara has been missing a significant amount of work for a variety of reasons (sick leave, car broke down, helping parents, etc.). In a team meeting, Morgan makes a comment about everyone pulling their weight. Sara becomes upset and begins shouting, becoming aggressive toward the group. Sara and Morgan are both your direct reports.

What eLearning topics may be helpful to keep in mind?

Possible responses may include:

- Performance Plans & Reviews
- Civil Service Rules & Labor Relations
- Resolving Performance Issues
- Pay, Leave, & Time
- Unlawful Employment Discrimination

What steps will you take? If the scenario does not specify whether the individuals involved are represented or non-represented, have each person in your group share how they would respond, based on whether their direct reports are represented or non-represented.) Possible responses may include:

- Put the meeting on hold/ask team to return in 15 minutes or reschedule.
- Separate fact-finding from correcting behavior.
- Talk privately with Sara to find out if she is unwell/needs to leave.
- Have conversation with your manager and HR about next steps.
- Review applicable Civil Service Rules, Collective Bargaining Agreement, and agency policy.
- Schedule meeting with Sara. Share the behavior you have been noticing and ask for her side of the story. Listen. Identify whether steps for reasonable accommodation may need to take place. Clarify expectations. Document. Schedule follow-up. Consider EAP referral.
- Meet with the rest of the team. Listen. Without breaking Sara's confidentiality, clarify any team expectations. Document. Schedule follow-up.
- Depending on what Morgan said and how, consider meeting individually with Morgan to clarify any expectations.

Who will you involve?

Possible responses may include:

- Sara, Morgan, and team
- Your manager
- HR staff
- Possibly labor resources

Leadership Scenario #3

What tools and resources that we have explored in Leading Others will you use?

Possible responses may include:

- Creating a safe environment
- Self-awareness
- Styles and values
- Communicating as a leader, advocacy and inquiry
- Listening
- Planning to communicate/3C model
- Coaching
- Preparing for conflict situations
- Giving and receiving feedback

Thinking about your own work environment:

- Which ones have you already implemented, which may be helpful if you ever face this situation?
Answers will vary, but anything learners have done to set expectations, better understand team members, and build trust will likely be helpful.
- Which ones will you implement once you are back at work, which may be helpful if you ever face this situation?
- Possible responses may include:
 - Understand their own and their direct reports' communication styles
 - Practice communicating and listening
 - Practice planning for conversations with the 3C model
 - Practice coaching with the GROW model
 - Ensure performance expectations are documented and revisited regularly
 - Awareness of conflict management styles
 - Setting team agreements (norms/expectations)

What if? If learners finish early, ask them: How would your answers change if Sara was your direct report, but Morgan is the direct report of your colleague Bonnie?

- Possible responses may include:
 - Coordinate with Bonnie.
 - Bonnie may need to talk with Morgan (if Morgan's behavior was unprofessional).

Leadership Scenario #4

4. Megan, your employee, overhears an inappropriate conversation between Elena and Rob, two coworkers from your colleague Chris' team. Megan reports to you that she overheard the use of racial or ethnic stereotypes in the conversation, directed at Nelson, another employee on your team.

What eLearning topics may be helpful to keep in mind?

Possible responses may include:

- Unlawful Employment Discrimination
- Civil Service and Labor Relations (if the agency wants to consider discipline or other actions related to this incident, or even interview Elena and Rob, they may both be entitled to a Union rep in that meeting. Even Megan may want to bring a steward if you interview her, though she herself is just reporting the issue.

What steps will you take? If the scenario does not specify whether the individuals involved are represented or non-represented, have each person in your group share how they would respond, based on whether their direct reports are represented or non-represented.) Possible responses may include:

- Talk to Megan and get her side of the story. Ask for her statement. Take notes.
- Call HR and alert your manager ASAP.
- Give Chris (the supervisor of Elena and Rob) a heads-up, or have HR alert Chris.
- Do as instructed by HR. For example: HR may ask:
 - You to do fact-finding/collect statements from your employees (Megan/possibly others) about what they heard and/or experienced
 - Chris to make inquiries of his employees (Elena/Rob) based on what was reported – to ask them what happened.
 - If you or Chris are asked to step into these roles/perform these tasks, it is important to remain objective, to document facts with no commentary, opinions or personal reactions.
- Provide a reminder to your entire team about discrimination, and ensure the team's training requirements are current
- Review applicable Civil Service Rules, CBA, and agency policy

Who will you involve?

Possible responses may include:

- Megan
- HR and your manager
- Chris (the supervisor of Elena and Rob).

Leadership Scenario #4

What tools and resources that we have explored in Leading Others will you use?

Possible responses may include:

- Creating a safe environment
- Self-awareness
- Styles and values
- Communicating as a leader, advocacy and inquiry
- Listening
- Planning to communicate/3C model
- Coaching
- Preparing for conflict situations
- Giving and receiving feedback

Thinking about your own work environment:

- Which ones have you already implemented, which may be helpful if you ever face this situation?
Answers will vary, but anything learners have done to set expectations, better understand team members, and build trust will likely be helpful.
- Which ones will you implement once you are back at work, which may be helpful if you ever face this situation?
- Possible responses may include:
 - Understand their own and their direct reports' communication styles
 - Practice communicating and listening
 - Practice planning for conversations with the 3C model
 - Practice coaching with the GROW model
 - Ensure performance expectations are documented and revisited regularly
 - Awareness of conflict management styles
 - Setting team agreements (norms/expectations)
 - Review applicable rules, CBA, and agency policies

What if? If learners finish early, ask them: How would your answers change if Elena's and Rob's comments were directed at an agency customer?

- Possible responses may include:
 - Education for involved employees
 - Apology to agency customer

Leadership Scenario #5

5. Your agency has identified itself as a “scent neutral zone.” Bob continues to wear cologne to work. You have already spoken with Bob more than once. You speak to Bob again, and he interrupts you to complain to you about Bianca’s body odor. During the conversation, Thao joins in and agrees with Bob, telling you Bianca’s body odor is making it difficult for the team to work together. Bob, Bianca, and Thao are all on your team.

What eLearning topics may be helpful to keep in mind?

Possible responses may include:

- Performance Plans & Reviews
- Civil Service Rules & Labor Relations
- Resolving Performance Issues
- Unlawful Employment Discrimination

What steps will you take? If the scenario does not specify whether the individuals involved are represented or non-represented, have each person in your group share how they would respond, based on whether their direct reports are represented or non-represented.) Possible responses may include:

- Note: In this situation, learners may identify that it appears the supervisor tried to talk to Bob about this in a public place (because others joined in the conversation). What will the supervisor need to do to correct that misstep? Possibly apologize to Bob, meet with him privately, etc.
- Get guidance from HR and manager. If agency is scent-free, there is likely standard guidance (agency policy) available to all leaders from HR office.
- Speak with each person individually and work to keep all issues separate.
- Clarify for Bob why the cologne is not appropriate. As you have already spoken with Bob about it before, consider whether written expectations need to be given.
- Privately, speak to Bob, Thao, and each member of the team. Without directing the conversation, ask them all to share their observations about scents in the team.
- Talk to Bianca privately if it is a personal hygiene issue. (More information is needed. It may be that she is a heavy smoker or garlic-eater.)

Who will you involve?

Possible responses may include:

- Bob
- Thao
- Bianca
- Other staff on your team
- HR and your manager

Leadership Scenario #5

What tools and resources that we have explored in Leading Others will you use?

Possible responses may include:

- Creating a safe environment
- Self-awareness
- Styles and values
- Communicating as a leader, advocacy and inquiry
- Listening
- Planning to communicate/3C model
- Coaching
- Preparing for conflict situations
- Giving and receiving feedback

Thinking about your own work environment:

- Which ones have you already implemented, which may be helpful if you ever face this situation?
Answers will vary, but anything learners have done to set expectations, better understand team members, and build trust will likely be helpful.
- Which ones will you implement once you are back at work, which may be helpful if you ever face this situation?
- Possible responses may include:
 - Understand their own and their direct reports' communication styles
 - Practice communicating and listening
 - Values activity
 - Practice planning for conversations with the 3C model
 - Practice coaching with the GROW model
 - Ensure performance expectations are documented and revisited regularly
 - Awareness of conflict management styles
 - Setting team agreements (norms/expectations)

What if? If learners finish early, ask them: How would your answers change if Thao was on your colleague Vanessa's team, and not yours?

- Possible responses may include:
 - In the moment, end the conversation; schedule time to talk with Bob privately
 - Discuss Thao's comment with Vanessa. Vanessa may need to address Thao's behavior.

Leadership Scenario #6

6. You believe your employee Bane is not successfully completing his probationary period. When you schedule a meeting to talk with Bane about his performance, he tells you he plans to bring his cousin, Delia, who is a union representative, to the meeting.

What eLearning topics may be helpful to keep in mind?

Possible responses may include:

- Performance Plans & Reviews
- Civil Service Rules & Labor Relations
- Resolving Performance Issues
- Unlawful Employment Discrimination
- Hiring Process

What steps will you take? If the scenario does not specify whether the individuals involved are represented or non-represented, have each person in your group share how they would respond, based on whether their direct reports are represented or non-represented.) Possible responses may include:

- If Bane is not successfully completing his probationary period, he is not yet a permanent state employee. Get guidance from HR and your manager.
- Review applicable rules, CBA, and agency policy. (Some agencies' practices vary, but in general it is up to the employee to notify labor based on his perception.) Determine whether Bane is entitled to have a union representative present. Consider how having a union representative present might impact the conversation.
- Hold the meeting with Bane and possibly Delia. Clarify expectations that are not being met, and outline a performance plan if you do not yet have one.
- Review performance guidance and expectations already provided in advance of any meeting. Be able to discuss specifics if asked.
- Ask yourself what concerns you would have with a union rep attending this meeting. Contrast those with potential benefits to allowing the employee to have someone there. Discuss with HR. Note: Dept. of Labor lawsuits have suggested that if an employee is in a position *that could be organized*, and the meeting could lead to discipline, then the employer needs to allow the employee to bring someone with them. This means that the employee's Weingarten right to have a rep in the room for this discussion may be very broad, and the discussion in the room should lean heavily in the direction of allowing Bane to bring Delia with him, unless there is a very compelling reason why not.

Leadership Scenario #6

Who will you involve?

Possible responses may include:

- Bane and Delia
- HR, Labor Relations manager and your manager

What tools and resources that we have explored in Leading Others will you use?

Possible responses may include:

- Creating a safe environment
- Self-awareness
- Styles and values
- Communicating as a leader, advocacy and inquiry
- Listening
- Planning to communicate/3C model
- Coaching
- Preparing for conflict situations
- Giving and receiving feedback

Thinking about your own work environment:

- **Which ones have you already implemented, which may be helpful if you ever face this situation?** Answers will vary, but anything learners have done to set expectations, better understand team members, and build trust will likely be helpful.
- **Which ones will you implement once you are back at work, which may be helpful if you ever face this situation?** Possible responses may include:
 - Understand their own and their direct reports' communication styles
 - Practice communicating and listening
 - Values activity
 - Practice planning for conversations with the 3C model
 - Practice coaching with the GROW model
 - Ensure performance expectations are documented and revisited regularly
 - Awareness of conflict management styles
 - Setting team agreements (norms/expectations)

What if? If learners finish early, ask them: How would your answers change if Bane wants to bring five of his cousins to the meeting? Possible responses may include:

- ? Is there a limit on how many representatives a union-represented employee may bring with them to a meeting? Get HR guidance

Leadership Scenario #7

7. You believe your employee Sam is not successfully completing the trial service period. In addition, when walking by Sam's cubicle last week, you noticed this employee appeared to be shopping online using the state computer.

What eLearning topics may be helpful to keep in mind?

Possible responses may include:

- Performance Plans & Reviews
- Civil Service Rules & Labor Relations
- Resolving Performance Issues
- Unlawful Employment Discrimination
- Hiring Process

What steps will you take? If the scenario does not specify whether the individuals involved are represented or non-represented, have each person in your group share how they would respond, based on whether their direct reports are represented or non-represented.) Possible responses may include:

- Get guidance from HR and your manager. Discuss options and ways to address each piece separately.
- Review applicable rules, CBA, and agency policy.
- Review ethics policy and agency computer use policy. Confirm Sam received and reviewed them.
- Hold a meeting with Sam (if represented must allow Sam to bring union rep). Describe what you observed and listen to the response. Clarify expectations that are not being met, and outline a performance plan if you do not yet have one.
- Consider whether Sam has enough work to do.
- Note: Learners may identify that it appears the supervisor did nothing about the employee shopping online last week. Teams should address how to recover from that – discuss with employee what supervisor believed they saw and allow employee a chance to respond.
- Take care to keep the performance issues separate from the online shopping issue, except to take into account how computer misuse might impact or exacerbate poor performance.
- Review previous expectations and performance guidance provided to the employee. Be able to discuss specifics if asked.

Who will you involve?

Possible responses may include:

- Sam
- HR, Labor Relations manager and your manager

Leadership Scenario #7

What tools and resources that we have explored in Leading Others will you use?

Possible responses may include:

- Creating a safe environment
- Self-awareness
- Styles and values
- Communicating as a leader, advocacy and inquiry
- Listening
- Planning to communicate/3C model
- Coaching
- Preparing for conflict situations
- Giving and receiving feedback/R.E.S.P.E.C.T. model

Thinking about your own work environment:

- Which ones have you already implemented, which may be helpful if you ever face this situation?
Answers will vary, but anything learners have done to set expectations, better understand team members, and build trust will likely be helpful.
- Which ones will you implement once you are back at work, which may be helpful if you ever face this situation?
- Possible responses may include:
 - Understand their own and their direct reports' communication styles
 - Practice communicating and listening
 - Values activity
 - Practice planning for conversations with the 3C model
 - Practice coaching with the GROW model
 - Ensure performance expectations are documented and revisited regularly
 - Awareness of conflict management styles
 - Setting team agreements (norms/expectations)

What if? If learners finish early, ask them: How would your answers change if you observed Sam appearing to shop online right now?

- Possible responses may include:
 - Stop the behavior but keep that separate from discipline. Remain mindful of who is in the work area and keeping your interaction with Sam private and quiet.
 - As soon as possible, call Sam into a meeting to discuss the behavior and clarify expectations.

Leadership Scenario #8

8. Two members of your team, Walter and Tammy, had a falling out outside of work. While they used to work closely together to meet program goals, they now refuse to work with each other and it is impacting the team. Walter has also started wearing clothing that is inappropriate for work. Tammy complained to you that the clothing is unprofessional and is distracting, and told you that others outside of your workgroup have a problem with the clothing as well.

What eLearning topics may be helpful to keep in mind?

Possible responses may include:

- Performance Plans & Reviews
- Civil Service Rules & Labor Relations
- Resolving Performance Issues
- Unlawful Employment Discrimination

What steps will you take? If the scenario does not specify whether the individuals involved are represented or non-represented, have each person in your group share how they would respond, based on whether their direct reports are represented or non-represented.) Possible responses may include:

- Get guidance from HR and your manager. Find out if you have a dress code or policy that talks about attire.
- Review applicable rules, CBA, and agency policy.
- If possible, keep the issues separate – the working together and the clothing.
- Meet separately with both Walter and Tammy to hear their concerns, listen, set expectations and develop a plan. Request that if Tammy hears other employees expressing concerns, she tells those employees to talk to you. Clarify with Walter any expectations around clothing.
- Consider meeting with Walter and Tammy together, but don't force it if it could be destructive or counter-productive. Talk with HR for ideas. Mediation may be an option if both employees are open to it.
- Did supervisor notice the inappropriate clothing in the past and do nothing? Address now. Talk with Walter. Is there an agency dress code?

Who will you involve?

Possible responses may include:

- Walter, Tammy, and any other team members involved
- HR and your manager
- Consider EAP referral

Leadership Scenario #8

What tools and resources that we have explored in Leading Others will you use?

Possible responses may include:

- Creating a safe environment
- Self-awareness
- Styles and values
- Communicating as a leader, advocacy and inquiry
- Listening
- Planning to communicate/3C model
- Coaching
- Preparing for conflict situations
- Giving and receiving feedback/R.E.S.P.E.C.T. model

Thinking about your own work environment:

- Which ones have you already implemented, which may be helpful if you ever face this situation?
Answers will vary, but anything learners have done to set expectations, better understand team members, and build trust will likely be helpful.
- Which ones will you implement once you are back at work, which may be helpful if you ever face this situation?
- Possible responses may include:
 - Understand their own and their direct reports' communication styles
 - Practice communicating and listening
 - Values activity
 - Practice planning for conversations with the 3C model
 - Practice coaching with the GROW model
 - Ensure performance expectations are documented and revisited regularly
 - Awareness of conflict management styles
 - Setting team agreements (norms/expectations)

What if? If learners finish early, ask them: How would your answers change if your colleague Jen, another supervisor, told you Tammy complained to her about your clothing as well?

- Possible responses may include:
 - Thank Jen for the feedback.
 - Check in with Jen, HR, and agency policy regarding any questions on whether your own clothing is inappropriate.