



## FINDING THE JOY OF SUPERVISION

By Lee Pliscou, Executive Director<sup>1</sup>  
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Do you look forward—as in “I can hardly wait”—to meet with your staff to talk about supervision issues? If you don’t, you’re not alone. 58% of supervisors surveyed

would rather clean the bathroom floor with a toothbrush than supervise. I’m making this up. It’s actually 74%.



Many have written about how to supervise, and about various models and styles of supervision. I’m not writing from that perspective. Instead,

I’m writing about the excitement of supervision. About finding the joy in supervising.

No, I don’t *always* enjoy supervising. But most of the time, I do. I truly do. I didn’t used to, though. And it’s been a long journey.

### Three Beliefs That Make for Misery as a Supervisor

When I first started as a staff attorney in legal aid — in 1987, with California Rural Legal Assistance (CRLA), in my hometown of El Centro, California — I don’t remember if I was supposed to be supervising anyone. If I was, I didn’t. The clerical staff knew my job better than I did. For that matter, some of my clients did, too. They told me exactly how they thought I should be doing my job.

But I became the directing attorney pretty quickly—the two senior attorneys moved on, and so I was it. As the directing attorney of a regional office, I realized it was my job to supervise my staff. But I thought: *My real job is my legal work; supervising is a footnote. And: I have good staff, they know their jobs, and they don’t need supervision. And: I’ll supervise if I have to, such as for compliance or performance issues.*

The only supervisor training I had received at this point was from Gregory Peck, in the movie *Twelve O’Clock High*. (If I ever have to take command of a hard luck bomber squadron, I’ll be glad I watched this

movie.)

Each of those three beliefs seems reasonable. But especially when bundled together, they don’t make for much fun in supervising. They get in the way of supervision being a satisfying and rewarding experience for both the supervisor and the other staff. They get in the way of a supervisor helping staff to do their best work for the clients and communities we serve. They don’t foster professional growth. Actually, I take back what I said at the start of this paragraph. These beliefs seemed reasonable at the time. But they’re not.

### Supervision Is No Mere Footnote

I really am not writing about how important supervision is, or isn’t. But I’ll say this: I didn’t start enjoying supervision until I was overwhelmed by the sense that supervision was an important part of my job.

Over the years with CRLA, I was the directing attorney of three regional offices. From 1987 to when I left CRLA in 2011, I had rich range of supervisory experiences. You’d think after all that time, I’d have learned a bit about supervision, and I had. But it wasn’t the part of my job I enjoyed.

As a staff attorney and directing attorney, I found immense satisfaction in doing the real work of the organization—working directly with our clients and our communities. When I felt I was doing my job as an advocate, I felt I was doing my job. Supervision may have been important, but my time and attention was on doing good work, and not so much on helping those I supervised to do good work.

The idea that I needed to buckle down and embrace my role as a supervisor came unbidden. It happened as I left CRLA to join Micronesia Legal Services as its executive director. (MLSC is an LSC-funded nonprofit with eight offices covering a large region in the western north Pacific. Our central office is on the island of Saipan.) I had never worked at MLSC before. I had never been to Micronesia before. I had never served as an executive director before. On the page of what

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I imagined I needed to do, there was a fair amount of empty space. In the blank space, I wrote, “Be a good supervisor.”

Once I began to think about supervision as being an important part of my job, I undertook a disciplined study of models, styles, and theories of supervision. Just kidding! But I did read some stuff on the internet.

I also subscribed to some email listservs about supervising. And I got some professional coaching. Coursera has some good courses, too.

We have an office in Palau, which is a country you might also want to look up on Wikipedia. There’s a beautiful resort there that’s really, really well run. When I’m able to observe good management first-hand, I sometimes ask the managers how they do it. When you ask about supervision, you get a lot of different answers, all kinds of ideas and models, from “Hire good people and get out of their way,” to “Work alongside your staff every day.” Reflective supervision. Procedural supervision. Supportive supervision. Quality assurance. The manager of this resort had started out as a clerk at the front desk—an entry level job. Like many of us, he hasn’t had formal training to be a good supervisor. He hasn’t even seen *Twelve O’Clock High*. But he saw the supervision part of his job as quite important. So let that be a lesson to me.

And it was. My first big, belated step toward enjoying supervision was making this attitude adjustment --and moving supervision from a footnote to a main heading in my job description. This compelled me to learn more about supervision.

There are some things we enjoy, and we immerse ourselves in them because we enjoy them. Other things, we come to enjoy them because we immerse ourselves in them—because we discover something exciting we didn’t know was there.

### What Happens When You Supervise?

What do you think happens when you supervise? Or, asked another way, what do you think happens when you don’t supervise?

A few years ago, I learned that one of our staff attorneys had some cases that weren’t moving as expeditiously as we would like. The attorney was an experienced and trusted employee, and I was surprised; the attorney seemed capable of doing better. My first reaction was something along the lines of “Shame on this staff attorney.” This was followed by “Also, shame on the

staff attorney’s supervisor, the office’s directing attorney.” It took me a while, but I eventually I got to where I needed to be: “Shame on me, too.” I was expecting the directing attorney to be providing better supervision than the directing attorney was receiving.

The admonition to not take most stuff personally is a good one; but I hold that admonition in mind next to another one: take everything personally. Not in the sense that everything is my fault, but in the sense that, as a supervisor, there are probably things I could have done to help our staff do what they wanted and needed to do.

Later, I visited one of our regional offices. Our offices, like those of other rural organizations, are sometimes not easy to get to. I hadn’t visited this office in a year. And I was surprised to find that the office was not having weekly case acceptance meetings, which is prescribed by our policies. And then I realized that “surprise” was not the right reaction. After not having been there for a year, I should have been surprised only if things were exactly as I had expected.

I use these examples just to illustrate something that I have come to believe is important to me as a supervisor. Part of the relationship I have with my staff is the opportunity and responsibility to actively help each other succeed.

If you’re a lawyer, you’ve often been asked, “What kind of lawyer are you?” You probably don’t have much trouble answering that. But let’s also ask, what kind of a supervisor are you?

Here are some examples I’ve heard from people about how they see themselves as supervisors:

- As a supervisor, I monitor and regulate employees in their performance of assigned or delegated tasks.
- The best thing I can do is to stay out of the way.
- I direct, observe, and correct or improve what someone does or how something is done.
- As a supervisor, I create opportunities to show people how good they can be.
- Supervision is a space to explore practice, to build theory, attend to feelings and values, and to examine our actions.
- My job is to help my staff fulfill their career potential.

If you don’t enjoy supervising, maybe it’s worth penciling out a statement—a sort of mission statement, or theory of change—about yourself as a supervisor. What kind of supervisor are you? What happens when you supervise?

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## Supervision Is Not a Bad Word

If you're supervising only for compliance or poor performance, you're doing the miserable half of your job as a supervisor.

A colleague recently observed that I am not particularly risk averse—that I am willing to experiment. Or said another way, I am really good at failing.

And I've failed a lot at supervising. But lately, I've been failing more purposefully, and more productively. Purposefully experimenting with different models and techniques has helped me get better. I sometimes tell those I'm supervising that I'm experimenting, and ask them for feedback.

For example, some years ago, I was meeting with some of my staff weekly for supervision meetings. But it didn't work: we ran out of things to talk about, the meetings felt forced, and...I was not looking forward to these meetings. So we stopped.

Later, we tried the same thing again, and it was much more successful. What happened meanwhile was that I developed a better answer to the question about what kind of supervisor I was, and what I had to offer as a supervisor.

Here's the thing. You probably know everything you need to know about supervising. I heard a story once, from an author who was writing a book about supervision. He interviewed a supposedly world-class manager, who was achieving exceptional results for his business, about what he did as a supervisor. There was nothing exceptional about how he described his role as a supervisor. There was nothing he said about supervision that would have added much if anything to what you already know. But what made him exceptional is that he actually did the things he talked about. Everyday.

## Conclusion

I got on the road to becoming a better supervisor because I decided it was a road I needed to travel — I didn't expect to come to enjoy supervision. Sometimes supervision feels like the *Twelve O'Clock High* style: fixing things. Sometimes that's what's called for. But the most fun part—for me— is learning from my staff about our clients, about the work of our staff, their advocacy, and their professional goals, and discovering how we can help each other.

Way more fun than cleaning the bathroom floor with a toothbrush.

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- 1 Lee Pliscou owes a debt of gratitude to his formal supervisors at California Rural Legal Assistance: Alfonso Oliva, Michelle Crawford, Ramon Arias, Richard Kohn, Val Saucedo, Bill Hoerger, and Jose Padilla. The more he learns about supervision, the more he values the debt he owes. In 2012, he was hired by the board of directors of Micronesia Legal Services Corporation to serve as its executive director. MLSC is an LSC-funded nonprofit law firm which increases access to justice throughout Micronesia, including the Marshall Islands, the four states of the Federated States of Micronesia (Kosrae, Pohnpei, Chuuk, and Yap), Palau, and the Commonwealth of the Northern Marianas Islands. MLSC has a staff of forty-five, in eight offices, in four countries, and across four time zones.

Micronesians in the U.S. are eligible for LSC-funded legal services—see 45 CFR 1626.10. ("All citizens of the Republic of Palau, the Federated States of Micronesia, and the Republic of the Marshall Islands residing in the United States are eligible to receive legal assistance that they are otherwise eligible under the [LSC] Act.")

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## SAFETY CHECKS PROMOTING CMS/CSR HEALTH

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The Legal Services Corporation (LSC)'s Self-Inspection and Case Service Report (CSR) submittal time is coming earlier than expected with the new



Feb. 1st due date! By running the series of reports below in early summer, again in late fall and finally in January, any necessary cleanup on our case management system (CMS) database is more manageable and our overall confidence in

the data is much improved allowing us to timely and accurately assemble annual CSR reports for LSC and other funders. This systematic approach means that any problems are exposed earlier and any eligibility or procedural mistakes by staff can be discovered and corrected before an entire year of data has been affected. A number of the reports I run are specific to Northwest Justice Project (NJP), our CMS and the way we are structured. NJP maintains a Screening Unit that screens callers to CLEAR, a centralized intake/brief service system (hotline) as well as for a few other geographic or specialized units. The majority of the callers are screened for eligibility and then advised by either by a CLEAR advocate or transferred to an NJP branch office. Regardless of the CMS or organizational structure, many of the reports should be relevant and helpful to other LSC programs around the country.

NJP has been using LegalServer as its CMS for the past five years. The report descriptions below may use LegalServer terminology but much of the data collected by other systems is the same and I am confident that similar reports can be compiled within other CMS systems. Once safety check reports are developed, you can periodically run the reports and in our case download them into Excel for sorting or pivot tables. This makes the review of the underlying data and the self-inspection process itself faster, easier and more accurate.

### Safety Checks (pre-CSR)

The following is a list of reports we run at NJP:

- 1. Safety check financial:** Develop and periodically run a report showing the percentage of poverty for all closed cases. Make sure NO cases over 200% are included as LSC eligible (unless they fit into the few LSC exceptions) and that all cases between 125% and 200% have a financial override reason assigned. In our system, problems can arise when an advocate mistakenly chooses a financial override (only applicable to cases between 125 and 200%) in cases involving someone with income over 200% of the federal poverty guideline, typically for over-income seniors for whom we do have funding, but who are not LSC-eligible.
- 2. Safety check immigration:** Make sure there is an immigration status code recorded for all non-citizens and that only LSC-eligible immigration statuses have been assigned to LSC eligible funding sources. Even though choosing an immigration status for a non-citizen is a mandatory field in our LegalServer software, I run it anyway for review and to document that we deliberately monitor the system.
- 3. Safety check assets:** I run two reports (cases under age 60 — \$20,000 limit, and age 60 and over — \$40,000 limit). Make sure, if an asset override is chosen for seniors over \$20,000, it is correct.
- 4. CLEAR hotline cases closed higher than closing code B report:** For our hotline cases I check to see that the retainer and citizenship form are uploaded into the case record for any clients who received extended representation (higher than closing codes A or B). I check the accuracy of the office assignment to make sure that the case is a CLEAR office case and that it had not been transferred to another NJP office. (This is important as the LSC self-inspection requires an office breakdown of cases to be examined.)

5. **Assorted LSC-eligible closed case reports:** I run an LSC closed case report and do the following:
  - » Create a pivot table in Excel for assigned advocate to make sure no cases have been closed under a non-attorney's name ( legal assistant or screener) and have a primary advocate (Attorney or paralegal) assignment.
  - » Add assigned office to pivot table to make sure all cases transferred from the CLEAR hotline reflect the correct office corresponding to the advocate assigned.
  - » Sort/pivot by funding source to make sure all cases have a funding code assigned and that they are LSC-eligible sources.
6. **Non-LSC funding report:** Check that all funding sources set up as non-LSC are truly non-LSC and include non-LSC eligible cases.
7. **LSC cases with LSC eligible "yes" and "no":** (This may be LegalServer specific as the system is programmed to flag a case as LSC "yes" or "no" based upon a host of factors.) Check any case where "No" (not LSC-eligible) appears with an LSC-eligible funding code. Review the case notes and the intake information and correct the funding code or the eligibility.
8. **Re-opened case report:** Run a report of all closed cases that were "reopened" at some point during the current year. Check to make sure only cases that were closed in the current year were reopened in the year; if a case closed in a prior year has been reopened in the current year, make sure it was not counted in a prior year's closed CSR case report.
9. **PAI report:** Make sure all LSC-eligible cases completed by in-house volunteer lawyers have been assigned a PAI tag, program or other designation so they can be counted in the PAI - CSR report. (NJP does not run a formal in-house pro bono program but does have a number of private attorneys coming in and handling cases on premises.)
10. **"Aged" open cases report:** Run a report of all open LSC-eligible cases where no advocate time has been recorded for the case for a set period. (e.g., over 1 year no action). Find out why and instruct the advocate to either close the case or add a case note explaining why the case must remain open into the next year.
11. **"Other" report:** Check all cases closed using the "K - Other" closing code to make sure this is the most accurate closing code based upon the case information. (Most of the time it is not!)
12. **Duplicate case check:** This is a critical report for LSC purposes and I run this report only once after the closing deadline for the year. For those programs using LegalServer, this is a LegalServer report and it can be found in LegalServer under the Admin tab/Reports. There are two reports available — duplicate cases sorted by date of birth and duplicate cases sorted by name. (I prefer by name where the fields are: Case #, Name, DOB, adverse party, legal problem code, special legal problem code, legal category, date opened, date closed, closing code, LSC eligible and office assigned.) If you then sort the report in this order: name, date of birth, legal problem category, adverse party, legal problem code, you can easily identify instances in which there are multiple cases for the same client in the same problem category, which then triggers an analysis of whether they should be considered duplicate cases and one deselected or whether it is appropriate to have two or more cases.
 

If you have any questions or need help with setting filters, data fields, etc., please contact me at [suee@nwjustice.org](mailto:suee@nwjustice.org). Good luck!

  - 1 Susan Enchermerman began her career in civil legal services in January 1980 as the first Administrator of Evergreen Legal Services. She held this position until October of 1995 when as a result of a statewide restructuring plan, she left and began building the Northwest Justice Project (NJP) where she has been the Director of Administration for the past twenty years. NJP is a statewide program with seventeen offices and 200+ staff. When not administrating, she travels to foreign lands and buys for Art Gecko, her small import business. Sue may be reached at [suee@nwjustice.org](mailto:suee@nwjustice.org).