Management

REQUIREMENSFOR CASE STUDY

1

Minimum 5 typewritten pages

II

Sections of Term Paper:

A. Executive Summary

A review of the facts of the case

B. Issues */* Factors

An Explanation of the problems pertaining to the case

**C**. Strategies */* Recommendations

How would you solve each issue presented?

D.

Conclusion

An overall summary analysis of the information presented in the case

Insubordination or Unclear Loyalties*?*

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**Background**

Omega House was established for those terminally ill patients who needed to find inner peace and dignity as well as the best in hospice care in their remaining days. It had been started by a group that had been unable to sustain it financially and it had gone bankrupt and been closed for several years. Then, in the early 1990s, the Social Action Consortium (SAC) agreed to assume responsibility for it. It became one of many services provided by SAC, which brought together 17 different groups, including small social service agencies and donor organizations that wished to be involved in more direct service than contributing to a funding agency. For nearly 80 years, it provided service to the less fortunate and disenfranchised. It provided a wi**de range** of services, in addition to Omega House, including assorted special projects in the field of education, services to at-risk youth, shelters and apartments for those with special nee**ds, services** for people with HIV, addictions counseling, an inner-city health pro**gram and emergenc**y food **assistance, consumer cr**edit seminars, and political advocacy for issues that affected the poor and disenfranchised. Its expenditures and revenues in 1995 were roughly $8 million.

**Program Director**

Ellen didn't get much sleep. When she had been a full-time nurse, she used to fall asleep immediately after an exhausting but satisfying shift; she could leave the problems at work. However, now that she had become a prog**ram manag**er at Oriega House, she found that things tended to nag at her and keep her awake. Like today, one of her employees, George**, seemed to** be insubordinate. She would never have spoken to her superior in that tone. Why did he think he could g**et away wi**th it with her? She wondered if she appeared unsure of herself. Was George confused over where his loyalties should lie?

Ellen began working at the hospice as a registered nurse in patient care **five years ago.** Almost three years later, after her predecessor had been dismissed, she became the temporary program director and assumed the managerial responsibilities for Omega House, in addition to clinical oversight of patient care. Given her lack of managerial experience at the time of her temporary assignment, she had been promised managerial training by SAC but after two years was still waiting. Ellen felt very comfortable dealing with clinical care and was fortunate to have a strong clinical staff, an excellent and devoted kitchen crew, and a dedicated volunteer coordinator, who organized the extensive services provided by the volunteers. However, she was less comfortable with her managerial duties in relation to SAC. Also, the troubled financial history of the Omega House concerned her. To further complicate matters, the SAC administration had proven both arbitrary and autocratic in Elleo's experience. Though she had suffered through the bankruptcy, she missed the lean administrative structure Omega House had enjoyed before the bankruptcy and subsequent SAC ownership. Her clinical staff had a worked at Omega House before SAC assumed control and were often skeptical of SAC **mandated changes.**

Additionally, she was not quite certain what George, Omega's new development officer, was doing. Immediately before SAC's executive director, Patti Kelley, left to take another job with a prominent ecumenical relief organization, she had hired George. This left the organization without an executive director, as the governing board had decided to take some cime

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to fill the leadership position. George seemed to spend most of his time with the other · development people at SAC, working on the cross-program task force on fundraising. He was the only one with professional fundraising experience, and many within SAC viewed him as an

Ellen understood that should George obtain a large donation or grant for SAC, it could aiso help Omega House. However, it had been her experience that she had to fight hard for resources. Thus, when George had been assigned to her, she thought he would focus most of his attention on Oméga House. Ellen understood that Omega House was one of SAC's only programs with active volunteers who could raise funds. Thus, 'she understood that George could also be useful to other parts of SAC, but still felt that since George had been hired with money from a development grant previously given to Omega House, he should spend the bulk of his time serving their needs. Funds from this development grant had also been used to purchase office equipment used by George and others. . Ellen had also come to understand, based on gossip, that George's past job history involved a personal indiscretion that had led to his termination with another employer. This made it difficult for her to trust him completely.

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What's George Up To?

Ellen entered the kitchen early Monday moming and said, “Hi, Dan. What's for breakfast today?"

Dan, with his back to ber, was gyrating to the rhythm of a CD blaring in the boom box. Dan's wide-ranging preferences for music ran from the church hymos he played on Sunday evenings to punk. Ellen was not quite certain where this particular CD fit on the continuum but took the liberty of turning it down. Dan turned and noted her presence, “Oh, bi, you old bitty don't you like my music? I suppose you'd prefer MUSAK," he responded in a playfully scomful tone. He then approached her and hugged her, stating: “It's nice to see you., What's up?! Their relationship represented the friendliness existing throughout the Omega staff: approachable, playful, and comfortable.

While attempting to wrap ber arms around Dan's ample upper body, Ellen looked over his shoulder and noted a tray of long-stemmed glasses sitting on the counter in the dishwashing area and asked, "Who passed on*?*" The long-stemmed glasses were used by the staff to honor the patients who died. The a**verage stay wa**s only three weeks. To avoid developing the lack of feeling that one can find in service settings where people routinely suffered tragedy, the staff engaged in this ceremony each time someone died; they left a light on outside the person's room and shared a toast of a nonalcoholic sparkling beverage.

"Theo. He had been active all weekend. Fortunately, his immediate family was with him last night,“ Dan responded soberly. "Active" meant Theo had been showing the physical reactions that were symptomatic of impending death.

They both paused a moment before continuing. The customary, "That's too bad," did not seem to fit, as it was a bospice designated for people with terminal cancer or AIDS who were near death upon admission.

Ellen continued, "Say, what time did George come in on Friday? I was at the SAC office for a meeting. He usually comes through the kitchen. Did you happen to notice?"

Dan looked out the window and thought, "Let's see. I had finished breakfast and was outside having a cigarette. It must have been after 9 o'clock. He seems to come at about that time, except for a couple of times a week when he comes in while I'm doing the breakfast dishes, which would make it after 10:30."

Ellen thanked Dan and went to the portion of the old estate house where the patients were located. Her office was immediately behind the nursing station. She liked to be close to

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the action and sometimes wondered if she was cut out for chasing after administrative stafi, like George, who wasn'i communicating regularly with her.

That morning she dealt with the customary managerial concerns for the first half hour and spent the balance of the morning reviewing the financial statements in preparation for the budget meeting the next day. She noted that while SAC's development efforts had seemed to improve funding for Omega, Omega's own fundraising efforts had resulted in little change from the previous vear, when they didn't even have their own development officer. Now that they had George, she had expected Omega's contributions to rise. She also noticed that George's salary was charged to a grant, destined in its entirety to Omega's budget. She thought to herself, "If George is working for Omega, these numbers ought to be changing. Since he's charged to Omega, I really should be more aware of what he's up to.” She resolved to speak with George **that afternoon.**

**Confrontation**

Ellen walked up the stairs of the main portion of the house to the office, directly above the kitchen and Dan's blaring boom box, where George worked. She found him at the photocopy machine. When he saw her, he looked somewhat sheepish. Ellen noted that the yellow copies looked like flyers; she caught a glimpse of the im**age of a canoe, an**d the words "Boundary Waters Adventure" before he hastily scooped the copies up, and put them in the op**ened briefcase** positioned unsteadily on top of the photocopy machine. "Just taking a few minutes to make some personal copies brought in my own ream of yellow paper. I hope you don't mind," said George, averting her gaze. He then cleared his throat and proceeded, “What can I do for you?"

“I don't want you making hundreds of copies on our machine. The paper is a minor expense, but the copies are not. It's leased and we pay several cents per copy," said Ellen as forcefully as she could without shouting. She had not wanted their meeting to begin this way.

"Understood," responded George quickly. He continued, "I'd be happy to r**eimburse** SAC for the copies. I've done 300."

“That would be nice," responded Ellen before continuing. She paused briefly while he closed his briefcase and went to his office. She followed hi**m and took a seat after he gestured to** her to sit in the chair customarily occupied by the university inter, Li**sa, who was off at a retreat** for her university. Trying to change the mood from a disciplinary one, which she felt she had been forced into, to the collaborative tone she had intended, Ellen continued, "I wanted to compliment vou again on the 'casino night' last week. It went well, and I've received several calls from people who attended." She was referring to a fundraising event they had held the previous week; it was an evening on the lawn where the sponsors, volunteers, and staff played various casino-like games. She wanted to begin with something positive, even though she had discovered that Lisa had a larger role in the arrangements than she would have expected from an **intern.**

George responded, “Well, that's what I'm here for."

Fundraising was a big issue with Omega and SAC. Some of the low-profile SAC programs had been cut recently. Ellen had been told by SAC that her program would not be cut but was concerned nonetheless, since she wanted to upgrade some of their equipment as well as complete the remodeling of the facility. To do so, she needed more money, and George had been recruited for that purpose.

Additionally, some of Ellen's uncertainty stemmed from the autocratic style Patti, the former SAC director, had used to manage the various programs. Sometimes Patti had seemed capricious in how she would arbitrarily fire program directors. Ellen also had regarded her as insensitive; Patti would come in, unannounced, leading a delegation of visitors through the

facility. Since Omega was a hospice, Ellen felt that such visits should have been handled with greater sensitivity. Patti had also tried to micromanage many of the programs. She would make decisions about minutiae, sometimes change programs without consulting the program director, and involve staff from the various programs in SAC issues, such as the cross-program task force on fundraising. Ellen understood that this was a large concern for SAC, and she knew that George, who was assigned to Omega, needed to participate in this fundraising task force. However, Ellen was concerned that Omega's internal fundraising efforts were not getting the attention they deserved from George. It was apparent to Ellen that Lisa, the student intern, had assumed a leadership role, filling the vacuum left by George. However, Lisa w**as temporary and** should not supplant George.

With this in mind, Ellen then asked, "I was wondering how it was going with the Omega committee you're leading for fundraising?" Ellen had formed an internal committee, comprised of both staff and volunteers (some of whom were donors), to generate ideas for fundraising. She had heard from committee members that George was difficult to communicate with and frequently did not attend the meetings. Still, Ellen was aware of how both the staff and volunteers comprised a group that had been together for years, and that it would be difficult for George to be accepted immediately.

George stood up and loomed over Ellen who was still seated. He stated assertively and loudly, "Look, I can't get the job done if I'm to work in committees all the time here and at SAC." He continued to look directly at Ellen in a challenging manner.

Ellen responded quickly and decisively, "I asked you to be on that committee and I expected you to participate. These people have been a part of Omega for years and can contribute a great deal both in service and ideas. Those who are donors also provide a lot of financial support. They are the ones who keep us going. You can't ignore them., Furthermore, they need your fundraising expertise. I know it's difficult to enter an established group, but you won't have a chance if they don't perceive you as more cooperative."

George responded, still hostile, but more carefully this time after noting Ellen's displeasure, "I had no intention of leaving anyone out of the loop, or avoiding the committee, It's just that I'm part of SAC's cross-program task force. I had a few conflicts and I had to decide where to focus my energies. I felt I had to do what SAC wanted."

Ellen stood and walked around the room. She listened, thought for a moment, and then responded, "I understand that you need to coordinate your Omega efforts with the SAC teama's Overall development plans and may be asked to do things with them. However, when I tell you specifically what to do, I expect you to do it."

George responded tersely, “Maybe you should speak with the SAC develo**pment officer** so that we can all understand our jobs better,"

Ellen felt she was not getting through to George. She stated, "You're assigned here. Your salary comes out of my budget. I don't see the confusion. Yes, I'll speak with the SAC development officer to clarify what it is I told you to do and why I want you to do it. But that won't change that you're working here for me. So please do what I say."

Ellen felt that she couldn't have been more explicit. However, later, on her way home, she wondered if the problem was structural rather than individual. George reported to her and to SAC's development chief. She recalled how SAC's development chief sat in on George's interview with her and lobbied for George because of his skills, which he said would round out SAC's development team. Thus, she wondered, "Is the problem George, and what appears to be his irresponsible and noncommunicative behavior, or is it confusion over who is to direct his efforts, or both?"