

How to Be an Organized First Line Supervisor (FLS)/Operations Manager (OM)

Things to do daily:

- (FLS) Ensure that staff is on time and ready to work.
- (FLS) Brief staff each morning regarding challenges and priorities. (15-20 minutes tops, emphasizing high priority FRs, team work, swapping FRs for the day based on geo or other factors) NOTE: This may be more applicable to larger programs.
- (FLS & OM) ABC-Always be closing. FLS and OM should actively seek out DIS to ensure that field records and cases are closed out promptly after being thoroughly worked.
- (FLS) ABC-Always be checking. Checking their inbox to ensure that items submitted for review or closure are taken care of promptly or immediately turned back with specific direction and specific deadlines for update and return. This includes proper use of the case closure form.
- (FLS) Giving daily direction on high-priority field records and cases
- (FLS) Ensures that missed audits are carried out same day/next day.
- (OM) Debrief with FLS each morning after team briefings.
- (OM) Identify the challenges & opportunities of the day.
- (OM) Shield line staff from administrative activities as much as possible.
- (OM) Seek out and inform the Program Manager of needs or unusual circumstances of the day.
- (OM & FLS) Fill in for FLS as needed.

Things to do weekly:

- (FLS) Run and reconcile the open field record and open case lists.
- (FLS) Review and give instructions on any case open 7 days
- (FLS) Review and give instructions on any case open 14 days
- (OM) Review and give final directions on any case open 21 days.
- (OM) & FLS) cases over 28 days old are reviewed and FLS must provide an adequate explanation as to why the case is still open and a plan to close it promptly must be approved by the OM. OM continues to review these cases weekly until closure.
- (FLS) investigates all FRs closed as "J", refused examination and a sample of FRs closed as "H", unable to locate.
- (OM) spot checks closed cases to ensure the case closure procedures have been followed and forms are completed properly.
- (FLS) Ensure DIS have submitted their mileage.
- (FLS & OM) Monitor all incoming/outgoing OOJs for your team (FLS) and the program
- (OM) to ensure timely transfer to the receiving agency and to ensure dispositions are received or sent within two weeks.
- (FLS) conducts audits scheduled for the week.
- (OM) Reviews audit calendar and ensure appropriate progress toward audit schedule is being met.
- (OM) Spot-check high-priority field records and cases for QA purposes.

Things to do Monthly:

- FLS submits the audit schedule for the coming month.
- FLS submits a summary of the audits completed the previous month.
- OM reviews the audit schedule and recommends additional audits for underperforming staff.
- OM reviews audit calendar and ensure appropriate progress toward audit schedule is being met. The goal is to complete all audits prior to the end of the month or quarter.
- (FLS) ensures the statistics for the individual DIS and the team (FLS) are run and shares them with the individual and the team after analysis.
- OM ensures the statistics are run for the program and the Program Indicator Report (PIR) is completed and shared with staff.
- OM reviews and ensures that mileage has been submitted by all staff by end of month.
- OM reviews the PIR and sets goals to achieve program indicators. For goals that are below the target but within 10%, an immediate action plan is implemented to address the shortfalls. For goals the are more than 10% below the target, a long term action plan must be developed and implemented to address the shortfalls.
- OM writes a monthly progress report listing objectives achieved and noting course corrections needed. This report should also note outstanding contributions.