

Planning Case Study

What Now, Jeanne Leforte?

<http://lu.com/management/laforte.cfm>

Case analysis by Denise A. Wallace

Comprehend the case situation: data, identify relevant facts

Jeanne was hired by Derfer, and supported in taking on greater responsibilities by Derfer. She has worked with the public library system for four years, primarily under Edmonds who hand-picked her and has received excellent performance evaluations each year in addition to the added increase in responsibilities and /or promotions. Jeanne is looking forward to a good evaluation and raise this year: she has just found out she is pregnant, her husband is out of work, and they have a mortgage to cover. On her way to her evaluation she passes her co-worker, Consuelo, who is in tears running for the bathroom.

Edmonds is a micro-manager. He does not delegate nor does he advocate participatory management. He works very well with small teams and after taking on greater responsibility of the larger organization, is having problems managing said organization. He finds himself in way over his head due to his micro management style. Because of wanting to have his finger in every pie and have the final decision on everything, he is now overworked and stressed out. Instead of admitting to Derfer that he was having problems, he alleviated this stress by drinking. His drinking habit has escalated to drinking at work as noticed by his long time secretary, Bernice.

Derfer is the executive director and hired Jeanne right out of grad school forgoing the preliminary interview; he also encouraged her advancement to her current position. He is a systems manager who encourages a participatory management style with an open door policy for advice or assistance. He is unaware that Edmonds has a drinking problem or that there may be a larger problem with the management in that area.

Bernice has come to realize that Edmonds drinking has begun to adversely affect his judgment at work. She confesses to Jeanne, when she arrives for her evaluation, that she suspects Edmonds to be an Alcoholic and why. Bernice knows that Edmonds was drunk when he filled out Jeanne's and Consuelo's performance evaluation for this year and has told Jeanne not to be surprised when she gets it. Bernice stresses that she likes Edmonds and asks Jeanne to advise or help since she is Edmonds' favorite. Jeanne is surprised since she likes Edmonds too.

Jeanne's evaluation is way below par in such a way as to affect the much needed raise. She is almost speechless as Edmonds explains to her that he was not feeling well when he wrote the evaluation, apologizes by saying he will make it up to her next year, and he asks her not to go to Derfer since it would hurt his reputation.

Define the problem:

The problem here is not the impact a bad evaluation will have on Jeanne's family; the problem is that Jeanne has been evaluated by her superior while he was drunk. Edmonds basically admitted he had a problem and asked Jeanne to cover it up instead of taking responsibility for his own actions. Edmonds has been able to hide this problem from his superior and would like to keep doing so.

Jeanne likes working for Edmonds and has a genuine desire to help him, but she now must think of the larger picture: her family and the library family per se since his drunken evaluations affected more than just her.

Generating alternative solutions/implementing a plan and following up:

What should Jeanne do?

In this situation intervention is not the best course, since people with alcohol problems will not admit to having a drinking problem. Instead Jeanne should take note of Bernice's concerns and evaluate Edmonds' performance for herself to determine if she feels there to be a significant change in his behavior and managerial performance. If after her evaluations, she feels Bernice's concerns are valid, she should, with the assistance of Bernice, address their concerns with Derfer. They should discuss their concern with the changes in Edmonds' behavior and working habits and how they feel he may be under work related stress. In addition they should mention that they would not have brought this to Derfer if they did not feel this stress was affecting his judgment at work and his ability to be an effective manager.

Derfer should review documents from Edmonds' division from the past 24 months to see if any major changes in decision making behavior have occurred and upon finding such evidence, he should notify human resources concerning legal implications and procedures and then meet with Edmonds during a non-scheduled time to discuss changes in his performance and to recommended solutions. Solutions may include reduced work load, systems management training, or company paid rehabilitation. Derfer should follow up with more non-scheduled meetings to make sure corrective changes in Edmonds' performance are being executed.

Jeanne's need for a raise is circumvented by the greater need of the organization to 'fix' this management problem and her particular incident as well as that of her co-worker may be fixed in the interim.

***Note: I discussed this case with a manager and I am still not comfortable with the outcome of this solution. Jeanne has been wronged and she should be able to be re-evaluated without punishment. In a better world, Edmonds would step up and make things right. However I was informed that legal issues in the "politically correct environment" require the steps outlined above. Jeanne may not get the raise she was due, she may lose her house, but then again her husband may heal quickly and go back to work and she still has her job and the medical benefits that will help with her pregnancy. It would be nice to know how this case actually resolved.