

Council on Aging of West Florida Social Services Team

From Spinning to Winning:
How We Saved Social Services



Your Presenters



Kathy Irons
Social Services Director



La'Toshia Evans
Case Manager



Anna Hubbard
Social Services Supervisor
and Case Manager



Lindsey Mudge
Case Manager

Additional Team Members at Home



**Ella
Carter**
Case
Manager



**Lori
Coppels**
Case Aide

Session Objectives

1. Identify ways to communicate and educate clients, families, and colleagues differently.
2. Identify your own program/department optimization challenges and potential strategies to overcome them.
3. Learn how to implement best practices for rebuilding a hurting but dedicated team.

Disclaimer: We realize and celebrate that every person, organization, and current reality is unique. Our discussion today is aimed to inspire creativity with problem solving and morale resurrection. We hope our story gives you courage to face hard realities and practical ideas to work through them.

Setting the Scene

Our beloved and long-time Social Services leader, Suzanne, passed away early spring 2023.

Over the next 2 years, there were 2 different directors.

- February 2025 we found out that most of OA3B contract award was spent January 2025 (yes, in one month)
- March 2025 brought news of ADI over-spending
- Most clients had their services entirely suspended or drastically reduced

Can you imagine?

Following the previous Director's departure, the Programs Specialist from AAA reached out to CEO Newby.

- She already knew (and adored) our team, was aware of the funding crisis, and did not require programmatic or leadership training.

What we did not realize is that we would get word on her second day that **another** title, CCE, was overspent.

- More client service reductions and suspensions were coming May 2025, and the anguish was palpable.

The Forced Hard Reset: How We Began

- Hold space for grief
- Acknowledge disappointment and anger
- Embrace transparency to rebuild trust
- Ask a LOT of questions
- Share new leadership non-negotiables, values, expectations and priorities (share meeting #1 PDF)

The Forced Hard Reset: How We Began

- Intention in all decisions (aka: question everything)... and sharing the “Why?”
- Reframe – the spirit and purpose of our grants
- Communication – concise, frequent, and varied
 - Verbal
 - Written
 - Group

The Middle Months

- Set clear and understandable BOUNDARIES
 - We are not medical, crisis, or available on-demand
 - So do not give your clients your cell phone number
 - We cannot be all things to all people
 - Clients who require more than 20 hours of care weekly are quickly approaching medical needs that are beyond our scope of care
 - Limits according to our board and contract indications (CM not responsible)

The Middle Months

- Reeducate...everyone
 - Client service agreement with language re: our funding sources and oversight agencies
 - Started Lunch & Learn events
 - Outlook calendars and reporting client contact time
 - Shared stories/call outcomes with front desk
 - Declined after-hours answering service... because we are not medical, crisis, or available on-demand

The Middle Months

- Celebrate often, loudly, and with any good news
 - Governor finally signed the 25-26 budget?
Throw confetti
 - It's your birthday?
Throw confetti
 - You billed 80% of clock hours?
Throw confetti
- Adjust processes, address pain points, implement new tech
- Push enough to reveal limits and preferences
- Continuous reinforcement, teaming approach

The Now

- All case managers are still with us
- High morale, deep connections
- DOEA Sec. Branham complimented us to another PSA's provider
- Organized beauty and max efficiency came from chaos and despair
- **No titles overspent July 2025-June 2026 or enrollment panic at the end of FY**
- New client enrollment continues...

Panel Discussion

What we are leaving with you

- Confetti – because spontaneous celebrations are very important
- Favorite Things questionnaire
- Example leader user manual
- Call to action – think of one person on your team who seems disconnected.

What can you do in the next 10 days to help that person feel more seen and appreciated?



Council on Aging of West Florida

875 Royce Street

Pensacola, FL 32503

850.432.1475

coawfla.org