

# Essential line management

A step-by-step guide to line management



*The*  
United  
Reformed  
Church



# Contents

<b>Why manage? It's a good question ...</b>	<b>1</b>
Definition	1
Why do organisations appoint managers?	1
The 'legal bit'	2
Relevant documents	3
<b>Get it right from the start! Processes to help ...</b>	<b>6</b>
Introduction	6
Why?	6
Who needs one?	6
What should be included?	6
<b>How do I manage performance?</b>	<b>8</b>
Introduction	8
What do I need to do?	8
The meeting	9
What information should be covered?	9
One-to-one meetings	9
Personal development reviews	10
What is your immediate reaction to a staff appraisal?	10
Why do managers not relish appraisals?	11
Process	11
Giving and receiving feedback	11
After the meeting	12
<b>Working hours</b>	<b>13</b>
Flexible working	13
What do you do?	14
Can you refuse a request?	14
<b>Managing absence</b>	<b>15</b>
Holidays	15
Time off in lieu or TOIL	15
Sickness	16
<b>A good practice guide for sickness absence procedures</b>	<b>17</b>
Employees	17
Managers	17
Return to work meeting	17
<b>Summary</b>	<b>18</b>
Useful websites	18



# Why manage? It's a good quest on ...

## Definition

A manager is the person responsible for planning and directing the work of a group of individuals, monitoring their work, and taking corrective action when necessary. Managers may direct workers directly or theoretically.

Managing can, however, bring challenges – including dealing with conflict, giving difficult messages, dealing with difficult behaviour, not knowing what you can and can't do, feeling you have not got enough experience nor the time needed to manage effectively.

Think of an individual in your experience who many have managed you in the past – were they good at the job and if so what was it that made you experience their management in a positive way?

Some of the characteristics of being a good manager:

Fair	Consistent
Calm	Accessible
Has time	Courteous
Organised	Listens
Honest	Integrity
Confidence	Clear
Considerate	Communicates effectively
Self-aware	Decisive.
Supportive	

There are many facets to managing staff. Some of the tasks involved are one-to-one meetings, appraisals or personal development reviews (planning, notes etc), following up on actions, being available, answering queries, giving direction and checking how people are – this all takes time.

Time is the biggest and probably the most important factor in line managing staff – but it is time well invested!

Some of the tools used to manage staff are induction and probation periods, one-to-one and team meetings, objectives, appraisals/personal development reviews and coaching/mentoring.

## The 'legal bit'

All employers have legal responsibilities when employing people and line managers share these responsibilities. There are legal requirements around:

- health and safety – such as carrying out risk assessment and ensuring a safe working environment

- the Working Time Directive – rules regarding rest periods and holidays
- the National Living Wage – ensuring staff are paid according to the law
- General Data Protection Regulations (GDPR) – maintain confidentiality and the right to privacy;
- the Equality Act – ensuring equality, diversity and being aware of discrimination.

The General Assembly of the URC in 2008 agreed to encourage churches to pay according to the Living Wage Foundation (LWF).

## Relevant documents

As an employer there are various relevant documents that should be in place when employing staff:

1. Contract of employment
2. Job descriptions
3. Expected standards
4. A staff handbook
5. Policies and procedures.

### 1. Contract of employment

A contract of employment is a legal requirement under the Employment Rights Act 1996 consisting of 'implicit' terms, i.e. Duty of Mutual trust and confidence and 'explicit' terms, i.e. hours of work, location, holidays etc. As legally binding documents, any variation of terms to contracts of employment should follow a formal process and must be mutually agreed.

### 2 Job description

A job description should provide an overview of the job listing the main duties and responsibilities but should not be comprehensive. Job descriptions are living documents, evolving over time and therefore are always out of date! A job description should also define the 'how' as well as the 'what' of a job and a framework of what is expected helps with this.

### 3 Expected standards

It is worth giving some thought to the expected standards that you, your church or organisation would expect of an employee. By setting out standards

around customer service for example, you as a manager immediately have a tool to help you manage poor performance as and when necessary.

The framework could help to show if do their job and may contain these elements:

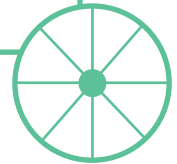
- communication
- equality and diversity
- health, safety and security



- sickness – reporting procedures and how to manage sickness absence
- IT – defines standards required when using IT, email, social media etc.
- flexible working – how to deal with a request for flexible working.

## Don't reinvent the wheel!

HR at Church House have template policies to help you.



As a manager you need confidence – you should acknowledge the authority that is inherent in your role and recognise that you are empowered to give direction and instructions to your staff /team.

You should set the standards for your department/team/direct report(s) and get to know your staff. Confidence comes with practice and experience, but ...

Be prepared to admit to mistakes – and learn from them!

### Summary:

- plan your time
- be aware of legal responsibilities
- familiarise yourself with specific terms and conditions e.g. hours of work
- keep job descriptions relevant
- familiarise yourself with relevant policies
- seek help when you need it.

# Get it right from the start!

## Processes to help ...

### 1 Induct on

#### Why?

The purpose of the induct on process is to ensure ef ect ve integrat on of the employee into their role and the organisat on; research demonstrates ef ect ve induct ons have benef ts for both employers and employees, specif cally with regard to retaining individuals.

#### Who needs one?

All individuals in new roles – either a new employee or an exist ng employee in a new role. The actual programme and length can vary depending on the needs of the employee.

Without an ef ect ve induct on there can be lack of engagement with the organisat on, poor relat onships with both line manager and colleagues, reduced product vity, poor quality of work and low morale – and eventually the new employee leaves (resignat on or dismissal).

#### What should be included?

What to include very much depends on the situat on/role, but could include:

- orientat on (physical) – describing where facilit es are; meet ng staf

- meeting with key staff and customers/clients
- support from buddy and/or mentor (coaching)
- details of organisation's history, culture and values.

For example:

**Line manager:** orientation, job role and setting objectives, key policies and procedures, meeting staff and customers

**HR:** paperwork returned (i.e. P45/6) training courses (if required)

**Facilities:** health and safety information; work place assessments

**IT:** PC requirements, login details etc.

**Education and learning:** 'welcome to URC' course.

It is helpful right from the outset to think about what your new employee/team member needs to learn and focus on – and setting objectives will help to identify this.

That we'll know  
acronym: SMART

# How do I manage performance?

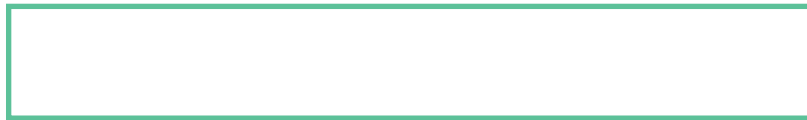
## 2 Probation

The probationary period is a period of time at the beginning of employment or a new role that has a dual purpose:

- to allow the employer to assess the suitability of the employee in their role
- to allow the employee to assess if the job is right for them.

Typical duration is three or six months which may depend on the role and could be as much as 12 months if the role requires a full cycle of work e.g. an academic year, a full financial/tax year.

A structured form is usually used to record objectives, details of learning achieved, any improvements that are required and if further training has been identified. [Academy of Health and Safety \(AHS\) \(AHS-9B\)/MCI do I ne0 1t iÑi;t](#)



## The meeting

The outcome of probation should not be a surprise. Prepare.

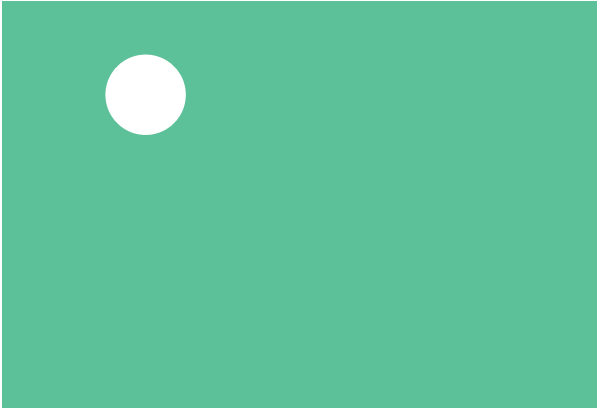
If you are unsure whether someone is making the grade, seek advice before the meeting takes place.

The meeting provides an opportunity to discuss the steps to be taken if the employee is likely to need an extension of the probationary period, or if they have not reached the required standard.

## What information should be covered?

## 4 Personal development reviews

### What is your immediate react on to a staf appraisal?



Personal development reviews (PDRs) are a more formal part of the ongoing day-to-day management of an employee's performance.

They provide benef ts not only for the employee but also for the manager and the organisat on as a whole.

**Employee:** by providing an opportunity of quality focussed t me with their line manager, allowing space to express opinion, ask quest ons, clarify job role, gain a bet er understanding of how their role f ts into the organisat on, to discuss future plans and development, ident fy training needs and to of er thanks/praise and receive formal recognit on.

**Managers:** benef t from the process by allowing t me with individuals to give thanks and praise, communicate departmental object ves/changes, discuss needs and aspirat ons, ident fy/review training needs, hear suggest ons for improvement and take feedback about their own performance. They are also a tool in managing change.

**Organisat on:** by providing a formal record of performance and an opportunity to communicate plans and expectat ons, understand the skills and aspirat ons of the workforce, help ident fy trends, opportunit es for improvement, training needs and to improve morale.



### Be aware of:

- jumping to conclusions
- talking too much
- discrimination – direct or indirect
- horns or halo effect
- not listening
- unconscious bias.

### After the meeting

Write up additional notes that have been added in the meeting and complete the forms with signatures from both the employee and the manager. Ensure any follow up happens and address any training needs that have been identified. Review the set objectives on an ongoing basis in one-to-ones.

Put dates in a diary! Make sure that you have the next review meeting scheduled.

#### Golden rules:

- preparation, preparation, preparation
- no surprises
- be specific...listen
- manage the meeting.





# Working hours

A manager needs to be clear about the exact contractual hours of team members, which may vary between individuals, and should be aware of what hours they are actually working in order to manage at endance ef ect vely.

The team need to



# Managing absence

## Holidays

What rules do you have in your department/office/team? What rules would it be helpful to have?

Paid time off from work is a statutory requirement for any employee, (currently at 28 days), which can include public bank holidays but can also be given in addition.

Employees who work part time should have their entitlement calculated in hours on a pro rata basis.

The GOV website includes a useful

A manager has responsibility to have an office/department adequately staffed at all times and should also ensure that staff take their holidays. If you need special rules for your department, make them and make sure that everyone knows them!

Don't be afraid to say 'no' to any request.

## Time off in lieu or TOIL

Be clear about how and when TOIL can be accrued and when TOIL must be taken and do not allow TOIL to build up.

## Sickness

Employee absence through sickness is mostly unavoidable absence. Monitoring and recording of sickness absence helps managers to manage these absences, identify patterns of behaviour and fulfil statutory requirements through payroll.

As an employer you should have a sickness policy in place – and at the very least detail your sickness requirements in a contract of employment.

It is good practice to have a procedure in place so staff know ou

# A good practice guide for sickness absence procedures

## Employees

Phone to speak with your line manager as soon as possible (e.g. before shift starts/9.30am etc):

- give reason for absence
- indicate when they expect to return
- agree further contact
- discuss any urgent/outstanding work (only if appropriate)
- complete a self-certifying notification or sickness absence form (SAF) on return to work.

## Managers

Record the absence:

- maintain contact throughout absence, as agreed with employee
- conduct a return to work meeting
- complete SAF (if applicable)
- forward SAF to payroll, with accompanying medical statement (fit note) where necessary.

The SAF is completed for any period of absence between one and seven calendar days (including weekends).

## Return to work meeting

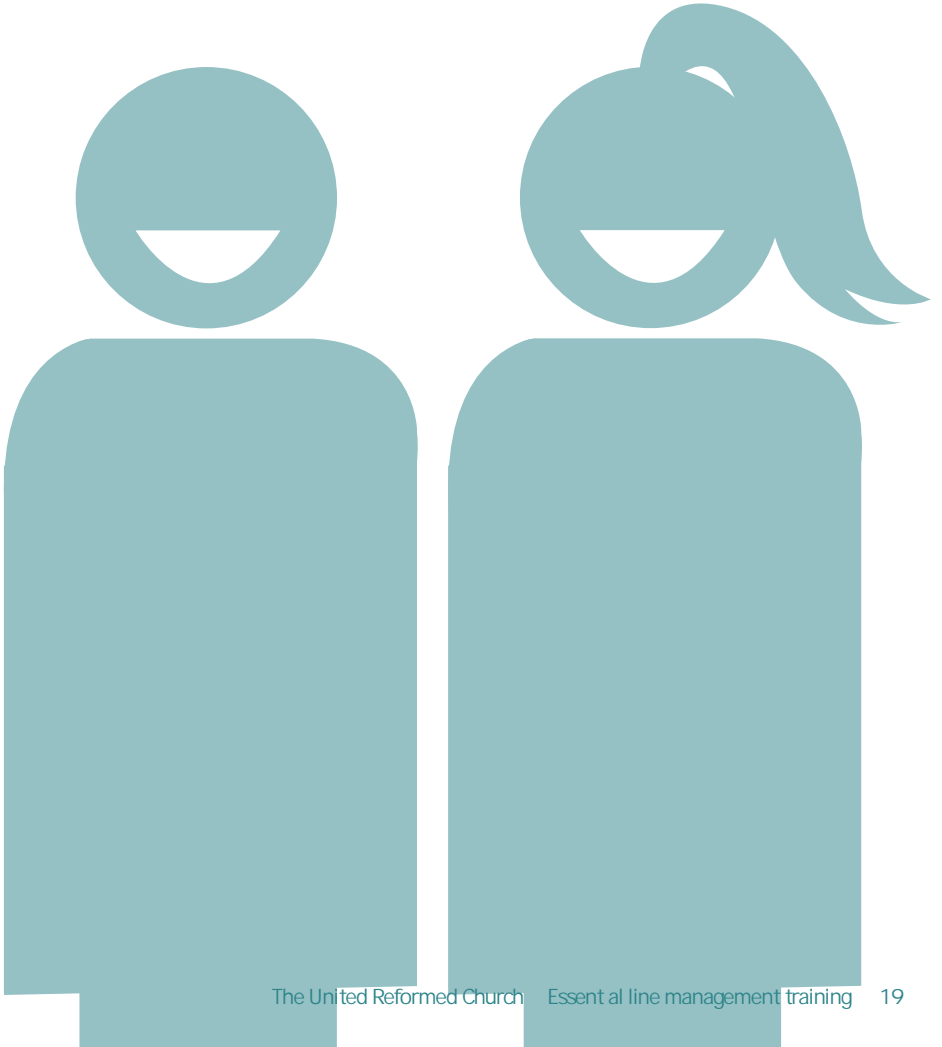
Welcome back the employee:

- ensure fitness to return to work
- agree any actions necessary to facilitate a return to full productivity
- discuss any issues that may be affecting the employee's health/attendance
- ensure certificates completed for entire period of absence (SAF1 and/or fit note)
- provide any department/organisational updates.

# Summary

An effective manager should:

- establish objectives/standards of performance consistent with requirements of position and in line with job description
- ensure employee is inducted effectively
- monitor, review, feedback during probation
- provide training and guidance as necessary
- hold regular one-to-one meetings and provide feedback during probation. A probation





© 2019, The United Reformed Church

Produced by the Communications Department,  
on behalf of the Human Resources Department.  
United Reformed Church House,  
86 Tavistock Place, London WC1H 9RT