



CfOE Webinar Human Resource Tips

Summary of HR Tips Shared by Webinar Participants

The following is a summary of tips provided by webinar participants after our webinar “Human Resource Essentials”. We are excited to share these with everyone!

Performance reviews and performance management was noted as a critical item for managers by 31 people. The following are some of the tips related to performance review and performance management.

- Be prepared for performance discussions: Set some time aside to get comfortable with the messaging you will be delivering to the employee. Think about language you will use, be ready to provide examples. Anticipate what their reaction may be so you can be prepared to respond accordingly
- Feedback should be timely and specific (don't wait for the review if you have something to say – provide feedback regularly).
- Discuss both the positive and constructive criticism. It should be a 2-way dialogue that allows people to celebrate their strengths, as well as making plans for areas that they want to develop.
- It is important to know what goals/interests staff have, that keeps them motivated to do the work.
- There is a difference between a Performance Review, a Performance Management Plan, and Progressive Discipline, although sometimes they all work together.
- Be diligent and timely with Performance Reviews and performance discussions (and documentation of them) so that there is an ongoing record that can be used by new supervisors to understand any necessary history when they take over working with a team.
- Always document discussions to ensure everyone has the same understanding of what was said, and follow-up to celebrate successes and support changes that were identified as needed.
- There should not be surprises in performance reviews, always address things in the moment.
- When addressing performance, ask questions to ensure that the individual understands what is being said and expectations are aligned.
- Most people want to do their job well.

Consulting HR when needed came up as the second most important thing, with 21 people commenting on it.

- Consulting with HR early, if uncertain about something, is a good idea. HR is a supervisor's friend!
- When uncertain about something in supervision seek out the support of HR. Let the staff know you are doing this so they are aware and let them know you will follow up with them once an answer/clarification is received.
- If you don't know the answer to something, it's okay to say so! Being transparent with someone and saying you need to consult with others in leadership/ HR prior to identifying a next step is a much better approach than guessing and having to go back and correct yourself later
- Don't undermine HR, a good manager / leader works with HR not against them.

Documentation was noted by 21 people to be critical

- Be mindful of situations where you can be exposed to risk. Formal check-ins, written feedback, and document, document, document!
- Always document and date your conversations – they don't have to be a formal note in the employee file all the time, but should be when appropriate (e.g., discipline).
- Ensure your "office files" with the non-HR file documentation is stored safely and securely (e.g., email it to yourself).
- A summary email to a conversation with an individual can ensure clarity on both sides and meet your documentation needs (include what the discussion was about and the plan/ expectation moving forward, thank them for engaging in the discussion, express your).
- Clarify-Ask-Document when it comes to progressive discipline.
- Ensure paperwork is in order to back up expectations – contracts, job descriptions – with necessary up-dates, etc.

Transparency: 18 people pointed out the importance of transparency.

- Be transparent on all sides – with staff and with HR.
- Be clear in your expectations and firm as necessary (if you say you are going to do something, follow through with it).
- Provide reasons behind decisions (not for them to argue with, but to assist in understanding).
- If staff does not know expectations – they can't adhere to them and succeed in their role.
- If staff aren't aware of when they have done something incorrect – they can't correct it
- The importance of clarity of roles – whose job is it to supervise the individual?
- Effective communication is essential. This means clear direction, expectation, but also confirming that the message has been received, understood and accepted.

The idea of "Common Sense" and how to consider it was shared by 11 people.

- Everyone's idea of "common sense" is different, and what may seem obvious to you may not be to someone else, and that is okay. As a leader we need to be clear and help team

members to understand where there may be differences that would lead to organizational/policy discrepancies.

- Don't make assumptions based on what you feel the employee should know, as they might not.
- Need to address positives as well as the negatives even though the negatives can be uncomfortable to talk about. Staff can't improve if they aren't aware of errors even as common sense as they may seem to management.
- Work within people's unique needs and preferences as you can while staying in policy. (e.g. How do people want to receive praise?)

Remembering that Legislation over-rides everything else was important to 10 individuals.

- Legislation is above all - always consider the OHSA, ESA and other relevant acts.
- Stay current with legislation can be challenging as it always changes so know where to find the information (suggestions include bookmarks or saving copies of legislation on the desktop).
- Understand the hierarchy of Policies (Government Legislation, Case Law, Regulatory Colleges, Agency Policies and Procedures). I have often used the term "Lost in translation" in situations where government policies aren't always referenced in the preamble of Agency Policy. 'Buy in' from staff includes clarity in connecting the dots between 'higher' policy and day to day practice.
- Know the Policies and Procedures better than your team – you can easily lead if you know what can and can't be done.
- No employee should ever feel like they are under duress to (for example, sign an employment agreement). The court almost always assumes the employee is in a vulnerable position compared to the employer.

Never threaten or promise something you can't deliver was noted as critical by 9 people.

- Don't over promise, don't state potential consequences if it is something you aren't willing to follow-up on.
- Always follow-through with what you say you will do.

The Importance of Policies and Protocols was highlighted by 8 people.

- Be confident and know that there are protocols and policies that are in place for a reason and consult as necessary about unique scenarios.
- Do not "policy" everything, work within the policies that already exist within your workplace. Creating a policy for everything discourages staff to grow and be innovative.
- Always be aware/knowledgeable about the updated Policies and Procedures of the agency so you can answer questions when they are presented to you.
- Practice can override policy when 'allowed' to happen consistently: Overtime, this can erode authority and lead to staff questioning what policy is 'actually important'. This increases potential risk to the Agency should a legislative policy not be followed.
- Know and consistently follow your union agreement.

- Remain transparent in terms of policy changes and the importance of them.
- Provide refreshers on policies in an interactive way.

Accommodations were indicated as important by 8 people.

- Importance of asking questions about possible need for accommodations: Given that it cannot be 'assumed' by a Leader/Supervisor that there is/is not a matter that requires accommodation, effort must be made to ask (and document that it has been asked) if any accommodations are required.
- Respect staff privacy and be transparent when information shared with you cannot be kept confidential (i.e., needs to be shared with other members of leadership or HR).
- Follow-up on accommodation plans to ensure they are still fitting the employee's needs.
- Understand what accommodating to the point of "undue hardship" means for your organization.
- Duty to accommodate employees, from a legal perspective – but also just the right thing to do!

Progressive Discipline was an important topic for 8 people

- Following up a progressive discipline meeting with an email to ensure both leader/employees is on the same page and has a mutual understanding of the discussion, actions and plan.
- Progressive discipline is a means of providing support and to address behavioral issues.
- To follow through with progressive discipline to be seen as fair and consistent to all staff
- Getting HR involved in the Progressive Discipline process: and ensuring that you are following your organization's model for progressive discipline.

How HR and Leadership work together was important to 7 people.

- HR and leadership both have a responsibility in creating and maintaining a healthy workplace culture.
- HR practices should be supportive of the individual and supportive of managing risk of the organization
- HR is more than just policy/ hiring!
- Everyone, staff and management, should understand HR's role and be comfortable in approaching them: HR plays a big role in supporting the culture of the organization.

Other Key Tips Include:

- Be a motivator – Be curious – Be consistent – Be compassionate – Be authentic
- Confidentiality – err on the side of caution when it comes to staff confidentiality. Don't share any information about an employee without their consent.

- Communication – communicate often and in a timely fashion (remember people need to hear something 7-10 times). Clear is kind!
- Fairness – Fair and equal are not the same thing.
- Integrity – Lead with integrity. Lead by example. As a leader/manager your behaviour sets the tone for others' behaviour, and you are held to a high standard.
- Listen – Encourage others to tell their story – whether it's feedback for you as a manager, ideas they have, concerns they are expressing...
- Role Clarity – know your own span and scope of accountability, ensure that staff understand the organizational structure.
- Invest in Staff – Know their goals, strengths and challenges and support them with all. And invest in yourself as a leader, keep learning and growing.
- Probation – It's not a legal requirement but a practice of the organization. Investing the time up front to support a new employee is both supportive and a good risk management practice.
- Do not Personalize Work - Whether you have a good connection with someone, or a personality difference it needs to be set aside for work conversations. Be aware that people will be looking for favoritism.
- Stay Calm – If you can't hold an appropriate tone, step away. Follow-up on difficult discussions after a bit of time to ensure everyone understands after the initial emotions have passed.