

# Line Management Guidance Induction and Probation

## Human Resources Toolkit

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## **Our Vision Prayer**

**Heavenly Father, we embrace Your call for us to make disciples, to be witnesses, to grow leaders and inspire children and young people. Give us eyes to see Your vision, ears to hear the prompting of Your Spirit and courage to follow in the footsteps of your Son, our Lord and Saviour Jesus Christ.**

**Amen**

# Introduction

Welcome to the Blackburn Diocese Human Resources Toolkit. The purpose of the toolkit is to guide you through typical aspects of the employee life cycle. This guidance should be used in conjunction with the downloadable templates which you can request for free from the diocesan HR team.

This section covers **line management**. Whether you are line managing someone for the first time, or have years of experience, this toolkit will help ensure that you do so safely, legally, and following best practice with confidence.

*If you need further assistance with line management, please contact the diocesan HR team.*

# Preparing for an Employee Induction

## What to include in an onboarding checklist?

### First day:

- Ensure Contract of Employment has been signed and filed securely
- Building/office tour (including fire exits, first aid kit, accident report book etc)
- Meet & greet key team members
- Set up workspace/equipment
- Introduction to work email address and any relevant Parish files
- Go through the Job Description
- Explain Pension information – if employee wants to opt out ensure this is put in writing. For those earning less than £10k a year, they will have to request to be opted in – again get this in writing. For further information please visit: <https://www.gov.uk/workplace-pensions/joining-a-workplace-pension>



### First two weeks:

- Any training that you would like the employee to complete. E.g Safeguarding basics and foundation
- Employee to read and understand any HR policies and procedures in place
- Employee to read and understand CoE commitment to Safeguarding
- DSE risk assessment to be completed

# Preparing for an Employee Induction

## What to include in an onboarding checklist?

### Role specific tasks:

- List any tasks that you would like your employee to complete and by which date. It is useful to follow the **S.M.A.R.T.** principles for this:

**Specific, Measurable, Achievable, Relevant, Time-bound.** This acronym is beneficial for setting goals and objectives and allows for a structured probationary period review. Ensure these tasks coincide with the job description.

- This section can also be collaborative. If appropriate for the role, feel free to include any areas that the employee has suggested for their own development.
- Remember that it will take some time for the employee to settle into the new role.

*An example new starter checklist is available for you to download. Please contact the HR team for access.*



# Keeping Track

Conducting regular check ins and 1-1's with the new employee will help enable positive communication to keep track of how things are going. For example, identifying any areas where further support is needed. It is better to keep this conversation ongoing so that you can achieve the best results from your employee.



# Probationary Review

## Half-way point:

We recommend having a formal meeting half way through the agreed probationary period. For example, if the probationary period is 6 months long it is beneficial to have a review at the 3 month point.

If you have been having regular 1-1's there shouldn't be any surprises in this meeting. However, if there are any issues, now is a good time to address them so that improvements can be made prior to the probationary period end date. Consider how you will help your employee achieve the desired improvements.

Ensure that the criteria for the review at the half-way point is the same as what will be assessed at the end point. This ensures consistency for the employee.

Make sure to record this review and store in your employee file.

*A probationary meeting form template is available for you to download. Please contact the HR team for access.*





# Probationary Review

## End point:

The regular 1-1's and mid point review should have provided you with a strong indication of how your employee is doing. If improvements were required hopefully both you and the employee have been working together to solve the issues.

Before the probation end date, you will need to hold a formal meeting to let your employee know the outcome of their probationary period. In most cases, employees pass their probation and their contractual employment is confirmed.

Where you do not feel that the employee is not meeting the expectations of the role there are two options you can take:

1. Extend the probationary period (1-3 months), with a right to terminate if no noticeable improvement.
2. Terminate the employment

Neither of these outcomes are desirable and are usually disappointing for both parties. Therefore, it is crucial that all steps have been taken to allow for improvements and to support the employee before reaching this decision. Follow up any decision in writing to the employee.

Please contact the HR team for advice on extending probation or terminating employment.



# Post Probation

Now is the time to build on all the work that has been put in so far. It is important to keep going with the regular 1-1's to keep things moving in a positive direction.

- Develop new goals to work towards. Make sure to follow **S.M.A.R.T.**
- Research any training that may benefit your employee (there is a lot for free online).
- Ask your employee if there is anything they feel they need from you in relation to their role. Open communication is key.
- Conduct a formal appraisal meeting once a year.



*An appraisal meeting form template is available for you to download. Please contact the HR team for access.*