HR Fundamentals & Practical People Management

Building Confidence Throughout the Employee Lifecycle

Today's Learning Objectives

By the end of today's training, you will be able to:

- Understand the fundamental HR responsibilities of managers
- Recognize your role throughout the employee lifecycle
- Know when to manage an issue and when to involve HR
- Set clear expectations and provide effective feedback
- Address performance challenges earlier and more consistently
- Navigate the transition from peer to manager
- Reset expectations and accountability within your team

MORNING SESSION

HR Fundamentals & The Manager's Role

Building the foundation for effective people management

Do not edit
How to change the design



Which part of managing people do you find the most challenging?

The Slido app must be installed on every computer you're presenting from

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HR FUNDAMENTALS

Managers Are the Front Line of HR

MANAGERS MAKE HR-RELATED DECISIONS EVERY DAY THROUGH

- Who they hire
- What expectations they set
- How they communicate
- What behaviors they tolerate
- How they recognize performance
- How they respond to concerns
- How they address performance problems
- What they document

You don't have to be an HR expert — but you do need to recognize your responsibilities.

HR FUNDAMENTALS

HR in a Small Organization

Small organizations create unique people-management challenges.

Managers often carry greater HR responsibility

HR resources may be limited

Roles and responsibilities frequently overlap

Policies may be less formal

Employees and managers have closer working relationships

One employee issue can significantly affect the entire team

Informal practices can quickly become “the way we've always done it”

HR FUNDAMENTALS

The Risk of Informal Management

Have you ever heard…

“We've always handled it this way.”

“Everyone knows what's expected.”

“We're like a family here.”

“I didn't want to make a big deal about it.”

“I've already talked to them several times.”

“I figured I'd wait and see if it gets better.”

“HR doesn't need to know yet.”

Informal doesn't have to mean inconsistent.

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Fair Doesn't Always Mean Identical

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EFFECTIVE MANAGERS STRIVE FOR

Consistent expectations

Consistent processes

Objective decision-making

Appropriate consideration of individual circumstances

Clear communication

Appropriate documentation

Consistency builds trust — even when individual outcomes differ.

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Manager vs. HR Responsibilities

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MANAGERS TYPICALLY OWN

- Day-to-day communication
- Work expectations
- Coaching
- Feedback
- Recognition
- Work assignments
- Monitoring performance
- Initial performance conversations

HR TYPICALLY SUPPORTS

- Policy interpretation
- Compliance
- Investigations
- Formal discipline
- Terminations
- Accommodations and leave
- Harassment/discrimination concerns
- Complex employee relations matters

HR FUNDAMENTALS

The Manager + HR Partnership

Manager

Owns the relationship and day-to-day leadership

HR

Provides guidance, consistency, compliance and support

Together

Create better employee and organizational outcomes

Don't “hand the employee over to HR.” Partner with HR.

INDEPENDENT DISTRICTS

You Are the HR Function

Your staff are district employees, not county employees.

County HR policies, staff and systems don’t automatically extend to your district.

As district manager or executive director, you are responsible for HR administration and support.

Your board sets policy and holds final authority on key personnel decisions.

No HR department doesn’t mean no HR obligations.

YOUR HR FOUNDATION SHOULD INCLUDE

- ✓ Board-adopted personnel policies
- ✓ Current job descriptions
- ✓ Payroll, timekeeping and benefits administration
- ✓ Organized, confidential personnel files
- ✓ Required postings, notices and training
- ✓ A go-to list of HR advisors

INDEPENDENT DISTRICTS

Handle It or Get Help?

HR influenced

YOU CAN TYPICALLY HANDLE

- Day-to-day supervision and coaching
- Setting expectations and feedback
- Documenting performance conversations
- Applying policies consistently
- Routine scheduling and time off
- New hire paperwork and onboarding
- Maintaining personnel files
- Required postings and notices

GET HELP BEFORE ACTING ON

- Creating or changing policies
- Terminations and serious discipline
- Harassment/discrimination complaints
- Leave and accommodation requests
- Workplace investigations
- Pay, overtime and exempt status
- Threatened or actual legal claims
- Issues involving you or a board member

Rule of thumb: if it’s hard to undo, involves a legal right, or involves you or a board member, get advice before you act.

INDEPENDENT DISTRICTS

Know Who to Call

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1 Board / Personnel Committee

Policy adoption, pay and budget decisions, and any concern involving the district manager or executive director

2 HR Consultant

Handbooks and job descriptions, investigations, and coaching through difficult employee situations

3 Employment Attorney

Legal claims or threats, high-risk terminations, separation agreements, complex leave or accommodation

4 Payroll / HR Platform

Payroll and tax filings, benefits enrollment, recordkeeping, compliance updates and templates

5 Insurance or Risk Pool

Workers' comp and liability coverage; many offer employment-law hotlines and training

6 Peer Districts & Associations

Sample policies, pay comparisons, training, and "how did you handle this?" advice

Build these relationships before you need them.

ACTIVITY

Manager, HR or Both?

For each situation, decide: **MANAGER | HR | BOTH**

- Employee has been late three times this month
- Two employees are experiencing interpersonal conflict
- Employee reports possible harassment
- Employee repeatedly ignores a work procedure
- Strong employee's performance suddenly declines
- Manager believes an employee should be terminated
- Employee requests a schedule change due to a medical condition
- Employee questions why someone else received a promotion

THE MANAGER'S ROLE

The Employee Lifecycle



The manager influences the employee experience at every stage.

THE MANAGER'S ROLE

Hiring

Managers help establish the relationship before an employee's first day.

- Clearly define the role
- Identify what success looks like
- Interview consistently
- Ask job-related questions
- Evaluate candidates objectively
- Avoid hiring solely based on “gut feeling” or “fit”
- Set realistic expectations about the job

Hire for what the job actually requires.

THE MANAGER'S ROLE

Onboarding

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ORIENTATION

Tells employees where things are.

ONBOARDING

Teaches employees how to be successful.

MANAGERS ESTABLISH

Expectations	Priorities
Communication norms	Team relationships
Performance standards	Feedback expectations
Connection to the organization	

THE MANAGER'S ROLE

Don't Assume They Know

New employees need clarity around:

What am I responsible for?

What does good performance look like?

What are my priorities?

How will my performance be measured?

Who should I go to with questions?

How does my role impact the team?

What happens when something goes wrong?

Clarity early prevents problems later.

THE MANAGER'S ROLE

Development

Development happens throughout employment.

Coach regularly

Provide feedback

Recognize success

Identify skill gaps

Provide development opportunities

Ask about career interests

Build employee capability

Prepare employees for greater responsibility

THE MANAGER'S ROLE

Performance

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MANAGERS ARE RESPONSIBLE FOR

- Establishing expectations
- Monitoring performance
- Providing feedback
- Reinforcing strong performance
- Coaching through challenges
- Addressing problems early
- Following up
- Holding employees accountable

Performance management shouldn't begin when performance becomes a problem.

THE MANAGER'S ROLE

Retention

Who has the greatest day-to-day impact on whether an employee wants to stay?

MANAGERS INFLUENCE

Engagement	Trust	Recognition
Communication	Development	Work environment
Fairness	Sense of belonging	Employee experience

THE MANAGER'S ROLE

Transition

RESPONSIBILITY CONTINUES WHEN EMPLOYEES

Transfer

Receive promotions

Resign

Retire

Are terminated

FOCUS ON

Professionalism

Communication

Documentation

Knowledge transfer

Team impact

Respect throughout the process

ACTIVITY · THE EMPLOYEE LIFECYCLE CASE

Meet Jordan

Jordan was hired six months ago. He interviewed well and seemed highly motivated. During his first week, he received basic training. Jordan's Manager assumed that he would ask questions if he needed help or didn't understand something.

After three months, Jordan began missing deadlines and some of his coworkers started completing portions of his work as a result.

The manager casually mentioned the issue several times. No clear, formal performance conversation occurred. Jordan believes that his performance is acceptable, however, his coworkers are now frustrated.

The manager is considering formal discipline.

Where did the process first break down?

What could the manager have done differently?

What should the manager do now?

When should HR become involved?

What impact has the delay had on the rest of the team?

EXPECTATIONS

Performance Problems Don't Always Start With Performance

MANY PERFORMANCE PROBLEMS BEGIN AS

- **Expectation** problems
- **Communication** problems
- **Training** problems
- **Feedback** problems
- **Follow-through** problems

Before assuming an employee “won't perform,” determine whether they were given what they needed to succeed.

EXPECTATIONS

You Can't Manage an Expectation You Haven't Established

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STRONG EXPECTATIONS ANSWER

WHAT needs to happen?

WHY does it matter?

WHEN does it need to happen?

HOW will success be measured?

EXPECTATIONS

From Vague to Clear

VAGUE

“Be more responsive.”

CLEAR

“Customer emails should receive an initial response within one business day, even when the full answer requires additional research.”

EXPECTATIONS

Expectations Should Describe Behavior

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INSTEAD OF

“Improve your attitude.”

DEFINE

What behavior needs to stop?

What behavior needs to start?

What should the employee do differently?

What does success look like?

MORNING REFLECTION

Think about your current team.

What is one expectation you have that you may never have clearly communicated?

Write it down. Then ask yourself:

Would my employee describe the expectation the same way I would?

MORNING SESSION

Morning Takeaways

- Managers are the front line of HR

- HR and managers must work in partnership

- Managers influence every stage of the employee lifecycle

- Expectations must be communicated — not assumed

- Early conversations prevent larger problems

MORNING KNOWLEDGE CHECK

True or False?

- Fair treatment always means identical treatment

- HR should handle most difficult employee conversations

- Documentation should begin only when formal discipline begins

- Performance management begins when performance becomes a problem

- Managers have a significant impact on employee retention