British Red Cross

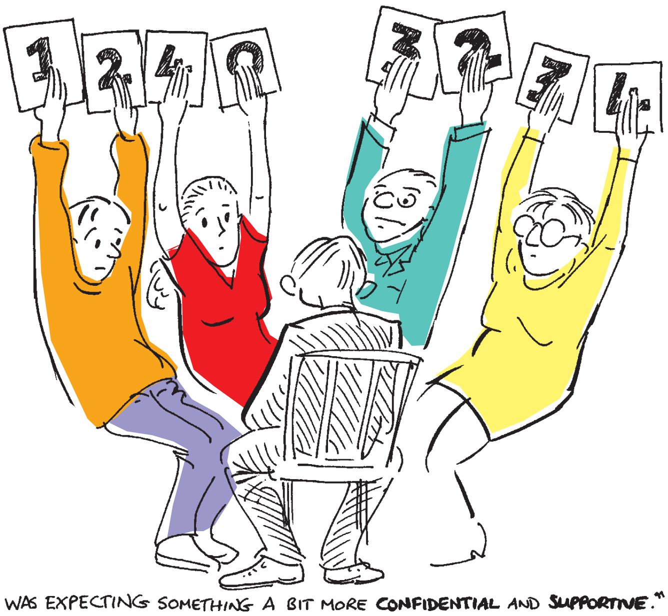
Good Practice Guide for Managers

Human Resources and Education Services Division

British Red Cross
Caring for people in crisis

British Red Cross

Good Practice Guide for Managers



"I WAS EXPECTING SOMETHING A BIT MORE **CONFIDENTIAL** AND **SUPPORTIVE**."

Human Resources and Education Services Division
British Red Cross

Acknowledgements

This British Red Cross Good Practice Guide for Managers was written by the Management Development Team, Philip Rosser, Christopher Clark and Hanne Stinson, in the Human Resources Division.

Particular thanks to Hanne Stinson who pulled the text together to ensure a consistent structure, approach and style.

The Management Development team would like to thank everyone – too many to mention by name – who contributed texts and ideas, commented on drafts, and suggested revisions and improvements.

They are especially grateful to the members of the Management Development Reference Group who came together at regular intervals over a period of some six months in 1999/2000 to discuss the Good Practice Guide for Managers and other management development initiatives. The Reference Group's involvement has helped to ensure that the Society's expectations of its managers in terms of managerial behaviours, competencies and good practice are realistic and achievable, and that the information and guidance in this publication is appropriate for managers throughout the Society.

Membership of the Management Development Reference Group:

Mollie Clark	Vice President, Northamptonshire Branch
Teresa Hanley	Programme Development Adviser, International Division, National Headquarters
Elizabeth Holloway	Area Director, Derbyshire and South Yorkshire Branches
Alex Keep	Centre organiser, Suffolk Branch
Lynn Kemp	Branch Director, Staffordshire Branch
Lynn Knowles	Recruitment and Training Manager, County Durham and Teesside Branch
Lynne Lavell	Regional Human Resources Manager, Scotland
Norman McKinley	Regional Director, Northern Ireland and the Isle of Man
Kevin Noble	Regional Training Officer, London and South-Eastern Region
Moira Osborne	Recruitment and Training Manager, Glamorgan Branch
John Payne	Regional Support Services Manager, Northern Region
David Quayle	Branch Director, Dumfries & Galloway Branch
Anne Roberts	Branch Director, Glamorgan Branch
Elizabeth Talbot	Recruitment and Training Manager, Avon Branch
Leanne Taylor	International Personnel Unit Manager, National Headquarters

Key

- Section 1 – Introduction
- Section 2 – The British Red Cross management behaviours and competencies
- Section 3 – Working as a British Red Cross manager
- Section 4 – 'Doing the job'
- Index
- Appendices
- Key information or summary
- Signposting to other sections of the good practice guide and other relevant information
- British Red Cross behaviours and competencies relevant to the text
- Case studies

Design and artwork by Twenty 3 Crows Ltd 01848 200401
Cartoons by Derek Gray, Scottish Cartoon Art Centre 0141 553 2018

Preface

Dear Colleague

In my working life as a manager I've read many management texts and guides but rarely, if ever, have they been tailored to an organisation in the way that this document has been.

The British Red Cross has been going through a period of major change and the chances are that it will continue to do so. In fact, managing change at both a strategic and local level is a key management skill, so you'll certainly have the opportunity to develop your competencies whilst working with us.

The main driver for the changes we are experiencing is the recent thrust towards developing a more flexible and responsive organisation that is needs-led and user-focused.

These changes have already brought significant benefits, but as the Society builds on its unique strengths, it must continue to change – adapting its structures, policies and procedures, and developing improved ways of working which will ensure that it can provide the services people need, and deliver them appropriately and effectively. Successful ongoing change on this scale requires changes in the culture of the organisation, and individual managers have a crucial role to play in this.

Every organisation has a style or ethos, which its managers need to support and reflect in their own behaviours. The British Red Cross needs managers who are committed to learning from all available sources and who will share their learning with others so that the organisation as a whole also learns. It needs managers who are committed to developing themselves and their teams, who will devote their skills and their time to managing and supporting each individual to achieve organisational and personal objectives. It needs managers who understand their accountability, who can manage information and use it to make the best possible decisions, and who are willing to take reasonable risks in the interest of improving outcomes, and then also learn from their experience.

A team working approach, which involves others and maximises the contribution each person can make, effective communication within and between teams, and a willingness to work in partnerships, are also essential if we are to achieve our objectives.

We need managers who value diversity and are committed to the Fundamental Principles and equality of opportunity, who will help to ensure that services are provided according to need, and who will challenge discriminatory behaviour and practices. And, of course, we need positive role models who are committed to achieving the Society's vision, mission, and strategic priorities.

This good practice guide details the essential tasks managers undertake to lead their staff through the processes needed to achieve our objectives. It does so by describing the behaviours and competencies managers need to fulfil their role, and management practices which should make the job easier, if no less complicated and demanding.

I hope you find this guide useful and stimulating, I do.

Roger Smith
Director of Human Resources, 2000

Contents

Key messages for managers

The management framework:

- delivers the British Red Cross management development policy
- defines the Society's expectations of managers
- defines the management tasks and activities required for effective performance
- demonstrates British Red Cross commitment to developing managers throughout the Society
- encourages senior managers to act as positive role models for other managers

The benefits of successful implementation include:

- more effective managers and decision-making at all levels
- improved ability to achieve the Society's strategic priorities
- more development opportunities and more focused training and development for managers and other staff
- improved retention of managers and other staff
- a culture of individual and organisational learning and development

Management development does not only benefit managers – successful implementation of the framework will help ensure that all staff receive the training and development they need for the job, and are supported in their longer term career and personal development.

Using the good practice guide will help managers to:

- implement the management framework
- understand the British Red Cross management behaviours and competencies and the Society's expectations of managers
- develop skills, knowledge and behaviours and 'do the job' more effectively
- access guidance, support and development
- make effective use of key activities to manage and develop their team:
  - developing individual work plans
  - recruiting to the team
  - inducting new staff
  - one-to-one supervision meetings
  - annual appraisals
  - identifying and meeting training and development needs for effective performance
  - identifying training and development needs for longer term career and personal development, and providing support to meet these

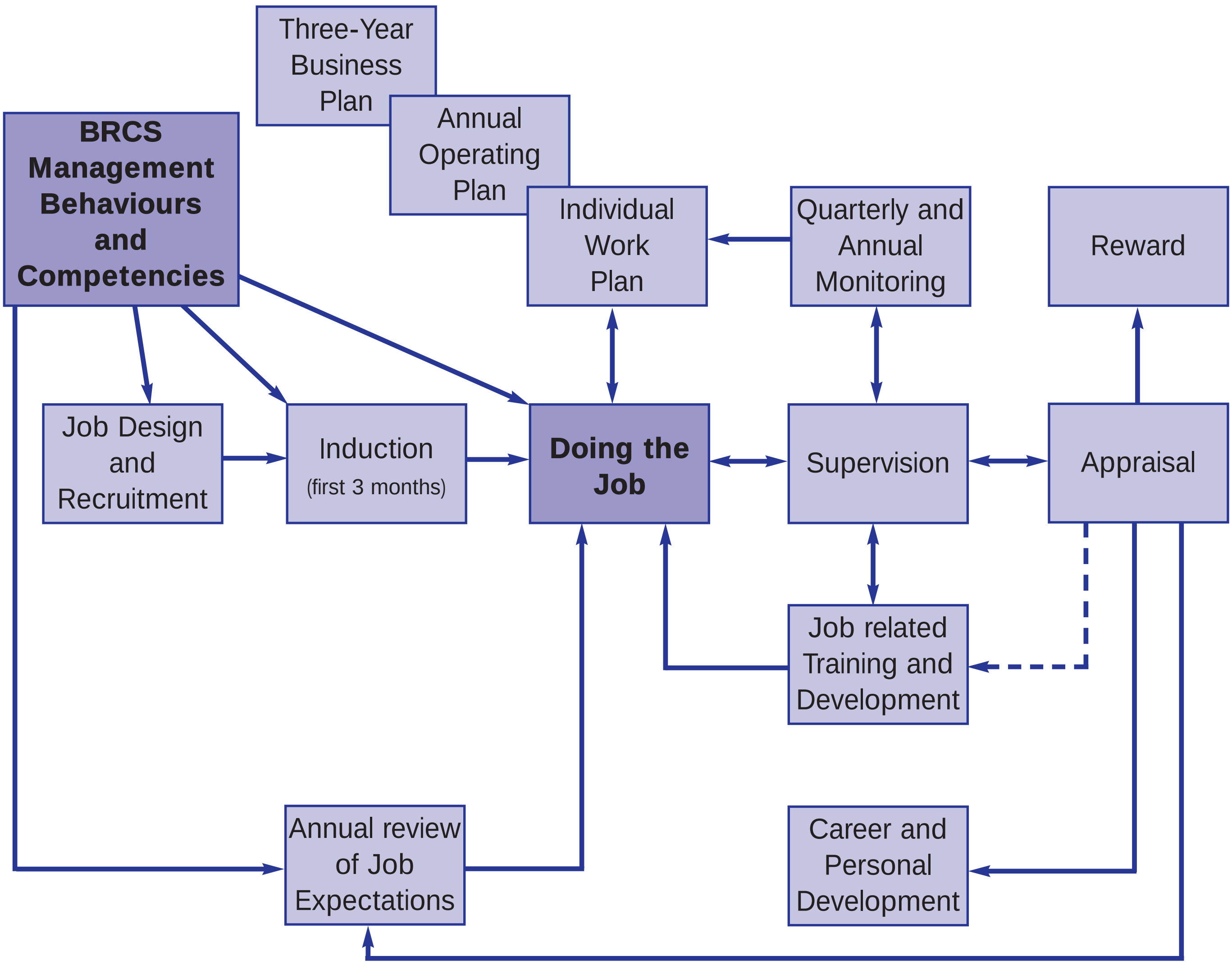
Using the good practice guide will also help senior managers to:

- ensure that the managers in their teams develop the British Red Cross management behaviours and competencies and meet the Society's expectations of managers
- ensure that managers in their teams implement the management framework

The management framework

The Society has developed a management framework outlining key tasks and activities which will help people develop the knowledge, skills and ways of working (behaviours and competencies) required for effective performance as a manager. The management framework is shown diagrammatically below, and also appears as Appendix 1.

The Management Framework



- **Appraisal** is one of the factors which will be taken into consideration when determining merit awards, and therefore influences the **reward** you receive for your contribution to the work of the Society.

- Your **job related training and development** needs (i.e. training and development for effective performance in your current role) are agreed and reviewed with your manager during supervision, and reviewed in your appraisal. Your **career and personal development** forms part of the annual appraisal discussion, so that your longer-term professional and personal development can also be addressed.

- Finally, the design of your job and your job description, are reviewed in your appraisal meeting. The **annual review of job expectations** helps define what **doing the job** means over the next year.

The management framework and the Society's strategic priorities

The **British Red Cross lead strategy, 'to deliver needs-led, user-focused services**', requires effective managers. Managers at all levels within the Society are making important decisions, accepting accountability for them, and recruiting, managing and developing their teams to deliver the strategic priorities.

Effective implementation of the management framework will support the lead strategy and each of the six supporting strategic priorities, making a particularly significant contribution towards:

- **Supporting strategy 1: Devolving responsibility for services**
- **Supporting strategy 3: Attracting and retaining the best people**

The Society has recognised the importance of management development in achieving its strategic priorities, by including it in the corporate objectives for 2004.

British Red Cross strategic priorities

Lead strategy:
Delivering needs-led, user-focused services

Supporting strategies:

1. Devolving responsibility for services
2. Securing long term income
3. Attracting and retaining the best people
4. Pursuing key partnerships
5. Harnessing management information and knowledge
6. Communicating a compelling Red Cross message

The purpose of the good practice guide for managers

This good practice guide for managers is designed to help you develop your understanding of the management framework and the associated management behaviours and competencies, and to use them to develop and improve your own performance and that of your team.

The Society's expectations of you as a manager:

- that you uphold the Fundamental Principles and ensure that your behaviour is consistent with the British Red Cross management behaviours
- that you ensure that your work and that of your team contributes towards the vision, mission and strategic priorities
- that you follow British Red Cross policies and procedures (you have some discretion over the way you implement procedures, but some procedures must be followed precisely, and your aim should always be to implement policy effectively)
- that you implement the British Red Cross management framework, e.g. by inducting, supervising and appraising staff
- that you develop your knowledge and skills as required by the British Red Cross management competencies
- that you develop and update the specialist/technical competencies required for your post

Using this guide on a regular basis will help you:

- understand the Society's expectations of you as a manager
- become familiar with the British Red Cross management behaviours and competencies, and understand their implications for your role and work
- implement the Society's various policies and procedures effectively
- manage your team and ensure that they achieve their agreed objectives
- identify your training and development needs and appropriate ways of developing yourself
- improve your team's performance through enabling them to identify and meet their development needs.

The good practice guide does not cover all aspects of your management role. It considers various issues relevant to you as a manager in the British Red Cross, and then provides information and guidance on implementing each component of the management framework in the context of you, the manager, 'doing the job'. Thus, for example, it provides guidance to help you to recruit and induct a new member of staff, and to manage your team's performance through supervision and appraisal. You are, of course, also supervised and appraised by your line manager, but the guide concentrates on you and the tasks you carry out.

The good practice guide for managers complements the Society's policies, procedures and guidance on the various management tasks it covers. It is *not* intended to replace existing policies and procedures, which you should continue to follow. For example, when carrying out one-to-one supervision, you should follow the Society's policy and guidance on supervision. The chapter on supervision in this guide highlights the most relevant management behaviours and

The guidance provided on each of the main topics follows a similar format:

- Heading and a brief introduction
- The most relevant British Red Cross management behaviours and competencies. Note that:
  - only the titles are listed: you should always refer to the full texts (Appendices 2 and 3)
  - other behaviours and competencies may also be relevant (many of the behaviours and competencies are relevant across all managerial activities)
- Case study one - illustrating problems which may arise as a result of poor practice
- The main text, which provides guidance on what you are expected to do, and how you could or should go about it. Where appropriate, the text incorporates key messages and signposting to:
  - relevant British Red Cross policies and/or procedures
  - sources of advice and/or information
  - relevant training and development
- Case study two - illustrating how a manager might avoid difficulties through good practice

Notes on the case studies:

The case studies are imaginary, but based on the kinds of situations managers deal with every day, and each is written to apply to a wide range of management roles. They are designed to illustrate the key messages and the application of the most relevant management behaviours and competencies, although other aspects of good practice may also be highlighted.

Two case studies based on the same scenario are provided on each topic. The first is an illustration of poor practice and problems that might arise as a result. The second gives an example of good practice. Do *not* read the second case study as a definitive answer. Other approaches may be equally successful, and any approach consistent with the British Red Cross management behaviours and competencies and the Society's policies and procedures, and which achieves the required outcomes, will be equally acceptable.

Management teams may find that discussing the case studies is a useful way of sharing their ideas and developing good practice.

2 The British Red Cross management behaviours and competencies

The British Red Cross management behaviours

The British Red Cross management behaviours and management competencies are an essential feature of the management framework. They are a statement of the Society's expectations of you as a British Red Cross manager. They are relevant to all your management tasks and activities, and you should use them, and refer to them, on a regular basis.

The British Red Cross management behaviours have been derived from a number of different sources, including:

- the Fundamental Principles
- the British Red Cross values (which were defined by the Society in 1993)
- the vision, mission and pledges
- the Society's corporate objectives
- various British Red Cross policies and procedures e.g.
  - Equal Opportunities Policy
  - Disciplinary Policy and Procedures
  - Grievance Policy and Procedures
  - Harassment Policy
- Legal requirements, e.g.
  - Charity Law
  - Health & Safety at Work Act
  - Race Relations Act
  - Sex Discrimination Act
  - Disability Discrimination Act
  - Working Time Directive, etc.

Behaviours:

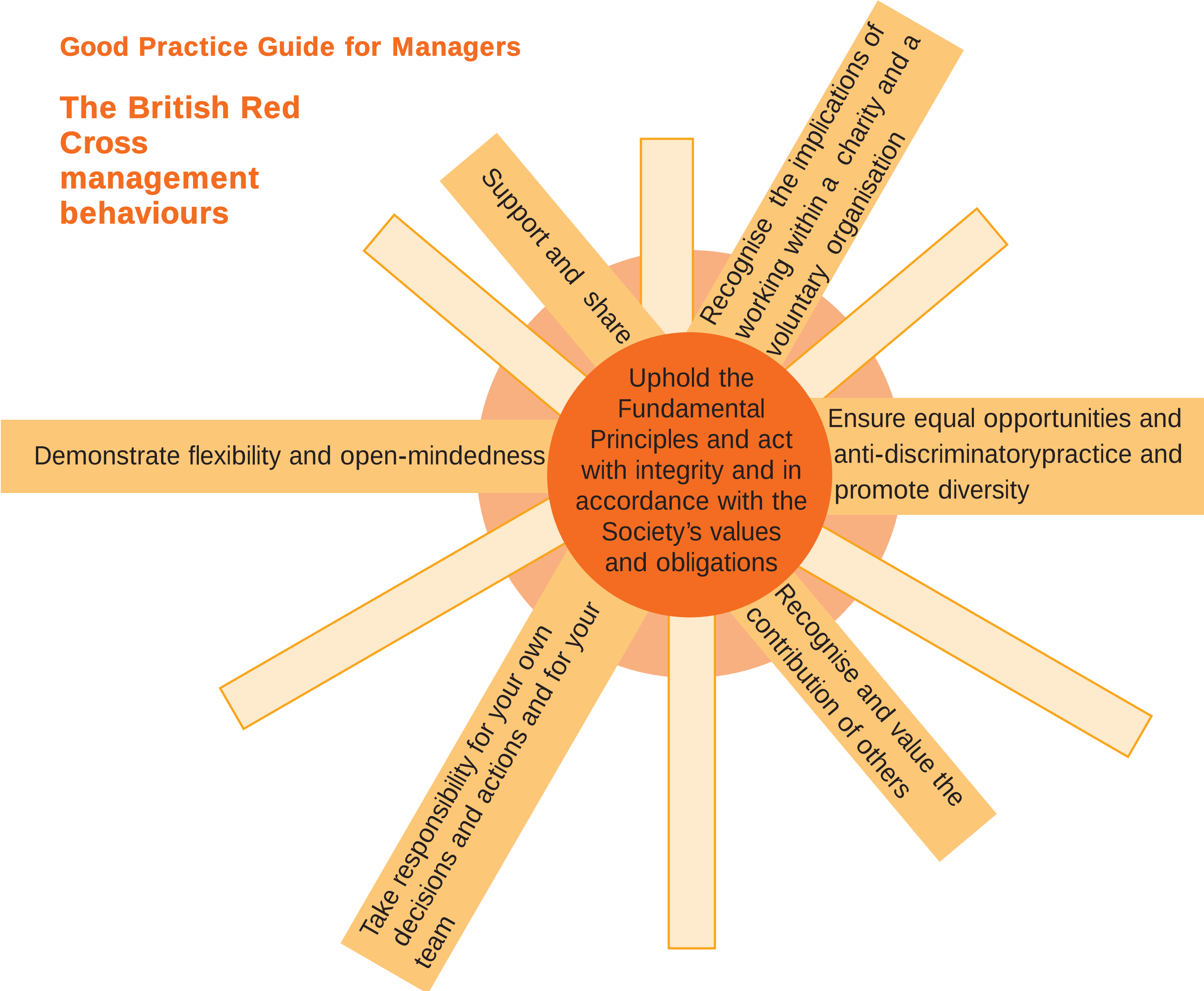
- **can** be written by the Society into person specifications, and taken into account in recruitment and promotion decisions
- **can** be monitored and reviewed by line managers, e.g. in one-to-one supervision and appraisal meetings
- **can** be identified as development needs for tasks within the work plan, and addressed through training and development activities
- **can** be changed by the individual, as a result of constructive feedback and/or development activities

The Fundamental Principles, the Society's equal opportunities policy, other British Red Cross policies and procedures, and various legal and ethical requirements determine the conduct and standards of behaviour required of the British Red Cross workforce, including its managers.

While the Society might hope that all its managers, staff, volunteers and delegates have attitudes, values and beliefs consistent with the Fundamental Principles and the Society's vision and mission, it cannot observe or monitor attitudes, values and principles, and cannot require people to change them.

The Society can, however, require its people to behave in particular ways, for example to uphold the Fundamental Principles, and not to discriminate unfairly. The **British Red Cross management behaviours** are a statement of the behaviours the Society requires of its managers. You must be familiar with them, and use them in your work. They will help you improve your own performance and manage your team's performance and development.

The British Red Cross management behaviours



The full text of the British Red Cross management behaviours is found in Appendix 2.

New managers are introduced to the British Red Cross management behaviours as part of their induction, and your line manager will help you to understand them, and to ensure that your conduct is in keeping with them. Your manager will almost certainly also encourage you to participate in a 'Managing Diversity' and an 'Ideals in Action' course if you have not already done so, and may identify other relevant training and development activities with you.

For information about these and other courses, refer to the staff and management development brochure or contact the Staff and Management Development Team at UK Office, or other training and development specialists.

When you and your manager have agreed your individual work plan each year, you should consider which British Red Cross management behaviours are particularly important for your tasks and identify any behaviours you need to address. You then discuss how you can improve or change these behaviours and include any agreed development activities on your training and development plan.

For guidance on work plans, see pages 75-76. For training and development plans, see pages 118-125.

Most of the management behaviours are also relevant to non-managers. If they would be helpful in managing your team's performance, use them!

Certain behaviours could lead to disciplinary action (these may also constitute 'gross misconduct' and could lead to dismissal). Examples include:

- wilful violation of the Fundamental Principles
- behaviour which damages the Society's reputation
- language or behaviour which is insulting or demeaning, or which reinforces unacceptable stereotypes
- harassment on any grounds, including sexual, racial, sectarian or disability harassment, and by any means
- bullying, whether verbal, physical or emotional

Of course, changing inappropriate or unacceptable behaviours may not require a specific development activity. Once you are aware of your behaviour and have reviewed your actions, a decision to change may be all that is needed. Your manager should also provide constructive feedback on your behaviours during your regular one-to-one supervision meetings and your annual appraisal, helping you to identify inappropriate or unacceptable behaviours and supporting you to change them. If you line manage managers, you will use the British Red Cross management behaviours and competencies when inducting, supervising and appraising your team, and in managing their training and development.

As a manager, you also have a general responsibility (including outside the line-management structure) to challenge, in an appropriate manner, any unacceptable behaviours you may observe within the Society and to act as a positive role model to others.

Inappropriate or unacceptable conduct and behaviour can form the basis of disciplinary and/or grievance procedures, which you may be required to manage.

For further discussion of performance and related issues, see pages 105-108, of this good practice guide, and the relevant British Red Cross policies and procedures, for example the disciplinary and grevious procedures.

The British Red Cross management competencies

Competencies are the skills, knowledge and understanding, and qualities and attributes which lead to effective performance in a given job or role and context.

Some of the management competencies e.g. those relating to innovative and creative thinking, and interpersonal and communication skills, may also be relevant to non-managers. If they are relevant to your team, use them in managing their performance!

The British Red Cross management competencies were developed from the British Red Cross role requirements and core competencies, and various external sources, including the MCI (Management Charter Initiative) management standards.

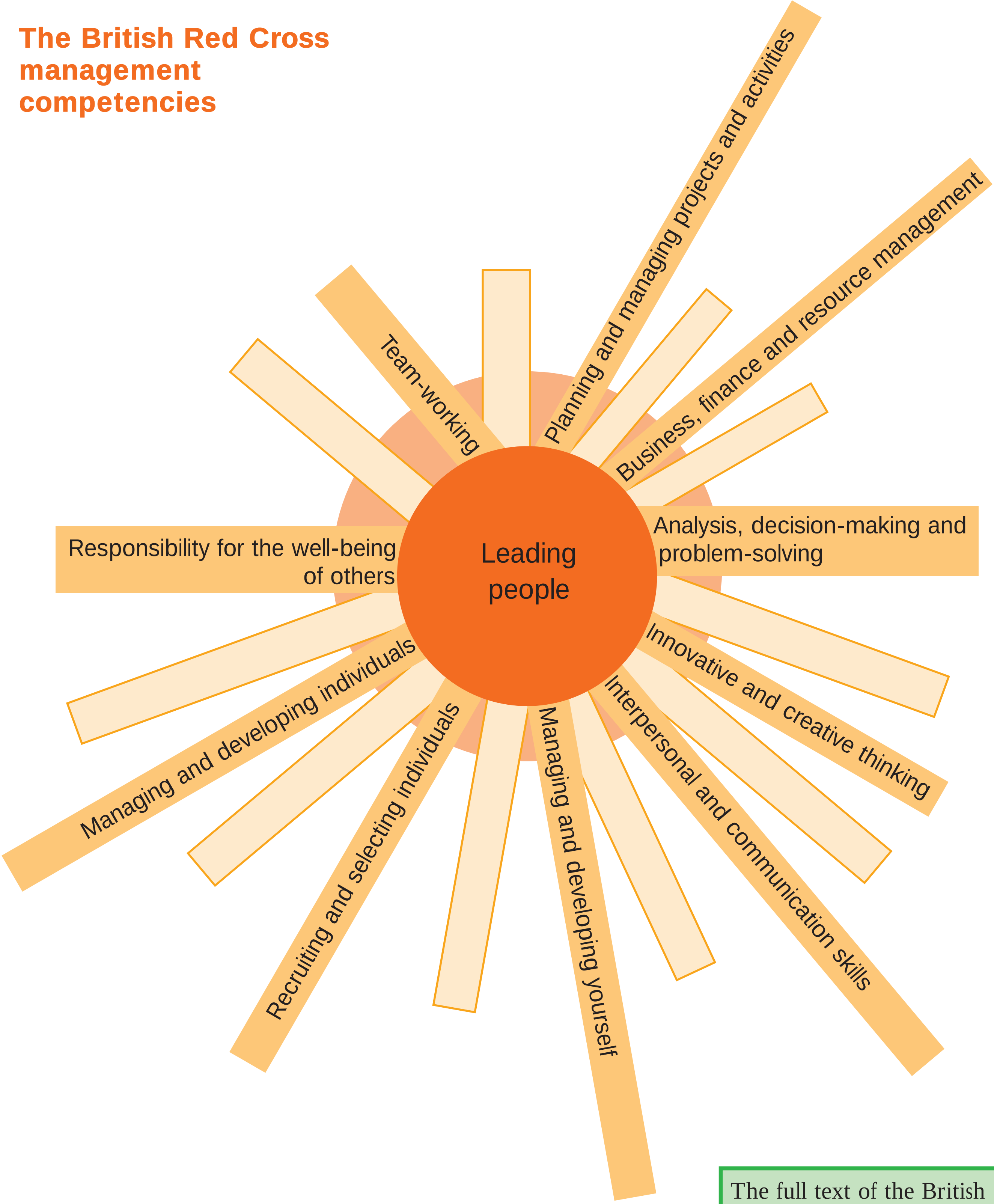
The British Red Cross management competencies, like the associated management behaviours, are a statement of the Society's expectations of its managers. They are relevant to all your management tasks and activities, and you should use them and refer to them on a regular basis.

They are 'generic' management competencies in the sense that they apply to all British Red Cross managers who manage other people (whether volunteers, paid staff or delegates). Many of them also apply to managers with functional, rather than line management responsibilities or advisory roles.

The British Red Cross management competencies are a key element of the management framework. They are designed to help you to develop your own management skills in line with the Society's expectations, and to develop your team.

The competencies have an emphasis on performance management (including induction, supervision and appraisal), and developing yourself and your team. The Society has identified these management competencies as particularly important in working towards a culture of continuous learning and development and the Society's aim of becoming a learning organisation. Some of the competencies have a general application to all management activities; others relate specifically to particular management tasks.

The British Red Cross management competencies



The full text of the British Red Cross management competencies is found in Appendix 3.

Your manager will help you to understand and become familiar with the management competencies, and to identify your existing competencies, any ‘competency gaps’, and how your development needs can be met. For example, if one of your tasks is to recruit to your team, you will need to work through the competency statements under competency 8: ‘Recruiting and selecting individuals’, and identify your ‘competency gaps’ and training and development needs.

Many of the competency statements under competency 8 are covered in the British Red Cross Recruitment and Selection Course, which is compulsory for managers involved in recruiting staff.

New managers are introduced to the management competencies as part of their induction programme.

For guidance on work plans, see pages 74-76. For training and development plans, see pages 119-125.

When you and your line manager draw up your individual work plan each year, you should identify the most important competencies for each activity. Any associated development needs should become apparent and you agree how to address these. Since the competencies inform all aspects of your management role, you can also expect your line manager to review your performance and your development needs against them in supervision meetings, and to use them in your appraisal.

3 *Working as a British Red Cross manager*

What's different about working for the British Red Cross?

Many aspects of a manager's work, and the competencies required for effective performance as a manager, are much the same, regardless of the organisation in which they work. You would, however, expect to learn new procedures and to adapt to a different organisational culture and 'ways of working', if you move to a new employer.

This section explores some issues relating to working for a charity and a voluntary organisation, and some specific to working for the British Red Cross, which you need to take into account.

The most relevant British Red Cross management behaviours and competencies for 'What's different about working for the British Red Cross?' are found under:

British Red Cross management behaviours

1 Uphold the Fundamental Principles and act with integrity and in accordance with the Society's values and obligations

2 Recognise the implications of working within a charity and a voluntary organisation

3 Ensure equal opportunities and anti-discriminatory practice and promote diversity

British Red Cross management competencies

1 Leading people

4 Analysis, decision-making and problem-solving

Working within a charity

As a manager working within the British Red Cross, you have a responsibility to ensure that your work and that of your team contributes towards the Society's charitable objectives; that you work within the legal requirements imposed by the Charity Commissioners, and that you avoid any action which might damage the Society's charitable status.

The implications for you, as a manager, of working for a charity include:

- ensuring the best use of financial and other resources
- considering the goodwill of donors, other stakeholders, and the general public
- maintaining the charity's reputation
- being aware of competition for funding and support
- building partnerships, e.g. with other charities, or with the statutory services
- remembering that support and income are dependent on quality
- being accountable to donors and supporters
- meeting stakeholders' legitimate expectations

No doubt you can think of others

Fortunately, this does not mean that you have to be an expert on charity law! However, you must recognise that some of the policies and procedures you are asked to follow are there to ensure that the Society meets its legal obligations under charity law. If you follow British Red Cross procedures you should not go far wrong, but if you are in doubt, do seek advice (from your line manager in the first instance). You should also take account of the moral and ethical implications of working for a charity, and the more practical implications, for example our reliance on the support of donors and other stakeholders.

Advice on charity law is available from the Legal Department at UK Office.

Working for a charity and an organisation that is committed to a 'cause' or a 'mission' (providing emergency help to people in need) brings additional obligations and pressures.

You, and your team, have an obligation to work towards achieving the Society's vision and objectives, and to be as effective as you can. You can probably anticipate a high level of commitment to the 'cause' from your team, and this can be very positive. A highly motivated team is a team which achieves, and staff may be willing to put in a lot of extra effort, e.g. taking on extra tasks, working late, or taking work home. This level of commitment brings benefits to the Society, but must be managed carefully. If staff become over-committed and you don't step in to help them to manage their time and workload, or if you exploit their commitment by delegating too much work, this may not only be damaging to them, but their work and their effectiveness may suffer. In extreme cases it may lead to 'burn-out', to serious health or personal problems, and/or to their resignation.

Bear in mind your, and the Society's, legal and moral responsibility for the well-being of staff, and seek advice from a human resources specialist, if required. You might also consider signposting an employee to the Employee Assistance Programme.

Working for a voluntary organisation

Working as a manager in an organisation which is governed by volunteers (the Trustees), and where volunteers make up the majority of the workforce, brings other obligations. Regardless of how much contact you have with volunteers, you should not lose sight of the fact that the role of the Society's management and staff is to create and maintain the framework which enables and supports volunteers delivering services in the community.

The Governance of the Society

The British Red Cross is established under a Royal Charter. The most recent Charter, approved by Her Majesty The Queen in July, sets out the structure of the Society, a system of governance and the duties and responsibilities of the Trustees, the Regional Councils and the Branch Councils. The detailed management of these bodies is declared in the Standing Orders – these are the rules upon which the Society conducts its business. The Board of Trustees is the primary decision-making forum, taking advice from the Chief Executive and volunteers for Council's and Forums. The Board will delegate certain decision-making powers to the Chair and the Chief Executive.

Volunteers are amongst the Society's most important stakeholders, and their motivation, their concerns, and the way they interpret the Society's vision and its objectives, are inevitably different to those of other stakeholders, e.g. service users.

Managing in this context may feel like a complex balancing act. Volunteer Councils and Forums have an important role in this respect and will have much to contribute on local and general issues.

If you and your team have a direct role in supporting volunteers, you will be aware of the importance of discovering what motivates them and ensuring that they receive the recognition and reward they deserve, while also making sure that all their work is carried out to high professional standards. Even if your work does not bring you into direct contact with volunteers, you must be aware of the need to balance their needs and expectations with those of the Society and its other stakeholders. Volunteers also have a legitimate expectation that they will be consulted on matters that directly affect them, and that their views will be taken into account - even if this does slow down decision-making.

British Red Cross stakeholders include:

- service users (in the UK and overseas)
- donors and supporters
- volunteers
- trustees
- volunteer councils and forums
- managers
- UK staff
- delegates
- the government
- partners in the statutory services
- voluntary organisations with whom we work in partnerships
- the Movement (ICRC, Federation, other National Societies)
- etc

Balancing and managing their various needs and expectations is a complex task, but none of our stakeholders can be ignored!

The Society can only develop partnership agreements with organisations whose mission and values are compatible with the Fundamental Principles and the British Red Cross vision, mission and strategic priorities.

The British Red Cross is developing more and more partnerships with other organisations in the voluntary and statutory sectors. If you are working alongside managers in another organisation in an existing partnership or building new relationships, you will need to bear in mind that your partner organisation will have its own mission and values, and different priorities, objectives, strengths and ways of working. Although organisations working in partnership should share a common purpose, the differences between them may still cause tensions. In any kind of partnership relationship, whether managing joint projects or providing related services alongside each other, you should each have a good understanding of the other organisation and a good working relationship with your counterparts. Open and effective communication and a willingness to address any issues as they arise, are also essential.

"BUT YOU SAID YOU'D TAKE MY NEEDS AND EXPECTATIONS INTO ACCOUNT."

The International Red Cross and Red Crescent Movement

The British Red Cross is part of the International Red Cross and Red Crescent Movement, and this too has implications for managers.

Each of the components of the Movement is bound by the Movement's Fundamental Principles, and all your actions and your decisions must be in keeping with them. You must understand the meaning of the Principles and how to apply them, and be aware that violations of the Fundamental Principles can have a serious impact, not only on the Society's reputation, but also on its ability to carry out its work, and the reputation of other components of the Movement.

If you are unsure about the interpretation of the Fundamental Principles, or how they apply in a particular situation, seek advice from the International Law Department at UK Office.

You should attend an Ideals in Action course to improve your understanding of the Movement as a whole, and of the Fundamental Principles.

A couple of examples of how being part of the Movement affects everyday work:

- If the public perceives the Society as being linked to a particular religion, this may discourage some people from volunteering or seeking assistance, and hence make it difficult for the Society to develop relationships and deliver services within some communities. The Society would be unable to meet the requirements of the Fundamental Principle of Unity.
- A public statement about the 'rights' and 'wrongs' of an armed conflict in another country might undermine the neutrality of the Red Cross and prevent it from helping the victims.

The Fundamental Principles of the International Red Cross and Red Crescent Movement

Humanity

The International Red Cross and Red Crescent Movement, born of a desire to bring assistance without discrimination to the wounded on the battlefield, endeavours, in its international and national capacity, to prevent and alleviate human suffering wherever it may be found. Its purpose is to protect life and health and to ensure respect for the human being. It promotes mutual understanding, friendship, co-operation and lasting peace amongst all peoples.

Impartiality

It makes no discrimination as to nationality, race, religious beliefs, class or political opinions. It endeavours to relieve the suffering of individuals, being guided solely by their needs, and to give priority to the most urgent cases of distress.

Neutrality

In order to continue to enjoy the confidence of all, the Movement may not take sides in hostilities or engage at any time in controversies of a political, racial, religious or ideological nature.

Independence

The Movement is independent. The National Societies, while auxiliaries in the humanitarian services of their governments and subject to the laws of their respective countries, must always maintain their autonomy so that they may be able at all times to act in accordance with the principles of the Movement.

Voluntary service

It is a voluntary relief movement not prompted in any manner by desire for gain.

Unity

There can be only one Red Cross or one Red Crescent Society in any one country. It must be open to all. It must carry on its humanitarian work throughout its territory.

Universality

The International Red Cross and Red Crescent Movement, in which all Societies have equal status and share equal responsibilities and duties in helping each other, is worldwide.

International humanitarian law and the red cross emblem

National Red Cross and Red Crescent Societies have a unique status and certain specific rights and responsibilities under national and international law.

Some of these are only relevant in situations of armed conflict, and may have little impact on day-to-day work in the UK, but if you want to understand the Red Cross, you need to understand a little about international humanitarian law (the Geneva Conventions and their Additional Protocols). In particular, you need to know that the red cross emblem is a protective emblem during armed conflict, and that to preserve its protective value, its use is restricted by international and UK law. The British Red Cross is only authorised to use the emblem by the Government according to internationally agreed regulations and approved national practices. As a manager, you have a responsibility to ensure that all proposed new uses of the red cross emblem are checked with the International Law Department, using the Society's procedures.

Use of the red cross emblem is covered in the Red Cross World induction programme and in more detail on the Ideals in Action course.

"I DO UNDERSTAND WHY WE NEED TO KNOW A BIT ABOUT IT, BUT DO WE REALLY NEED A DOCTORATE IN INTERNATIONAL HUMANITARIAN LAW?"

Equal opportunities and promoting and managing diversity:

Ensuring equal opportunities and promoting diversity are important objectives for the Society. The Fundamental Principles mean that the Society cannot discriminate. It must provide assistance to people based on their needs, and ensure that it is genuinely open to all.

Why equal opportunities and diversity?

- the Fundamental Principles
- the British Red Cross equal opportunities policy
- achieving the vision, mission and strategic priorities
- identifying and meeting the greatest needs in the community
- genuine equal access to the Society's services and employment and volunteering opportunities
- 'natural justice'
- anti-discrimination legislation
- benefits to the Society, including:
  - greater effectiveness
  - recruiting from a wider pool
  - 'best person for the job'
  - well motivated staff and volunteers who feel valued and respected as individuals
  - staff and volunteers who are fully representative of the community
  - maximising the benefits of diversity, building on the strengths and experience of individuals
  - the Society's reputation and its ability to build partnerships
  - improved ability to gain support from all groups in the community

If the Society is to achieve its vision, mission and strategic priorities, it must ensure that everyone has genuine and equal access to its services, and that it can reach and work with individuals from all the different groups in the community. In practice, it will be unable to achieve this unless its management, volunteers and staff are themselves representative of the whole community. A quick glance at the British Red Cross management behaviours and competencies will confirm the emphasis the Society places on the manager's role in achieving equality of opportunity.

As a manager, you have a responsibility to ensure anti-discriminatory practice in everything you do, and to implement the Society's equal opportunities policy and other relevant policies and procedures, for example in recruitment and selection of staff and/or volunteers, and in selecting individuals for training and development opportunities, secondments, participation in projects and working groups, etc.

Refer to the British Red Cross equal opportunities policy, recruitment and selection policy and relevant employment practices and procedures.

You have a responsibility to challenge discriminatory practices and any behaviours which might undermine the Society's objectives and its commitment to equal opportunities and promoting diversity, and to deal effectively with complaints of discrimination.

You must also ensure that you are a positive role model to others, demonstrating your personal commitment to equal opportunities and anti-discriminatory practice, promoting the benefits of diversity, and ensuring that the equal opportunities policy informs all your work and that of your team.

Training and development:

- Managing Diversity (for managers)
- Promoting Diversity (for your team)
- Ideals in Action
- Recruitment and Selection
- Employment Practices Module

The Managing Diversity, Promoting Diversity and Ideals in Action courses all – with quite different emphasis – include consideration of the Fundamental Principles, anti-discriminatory practice, achieving equality of opportunity and challenging inappropriate behaviour and practices. The Managing Diversity course emphasises the manager's role and responsibilities in achieving this.

The Recruitment and Selection course (compulsory for managers responsible for or involved in recruiting staff) emphasises legal requirements, and is designed to help ensure anti-discriminatory practice in recruitment processes. The Employment Practices Module will also assist in achieving anti-discriminatory practice and equality of opportunity.

The Society's equal opportunities policy is based on the Fundamental Principles, anti-discrimination legislation, respect for all individuals and groups regardless of differences, and a commitment to anti-discriminatory practice.
It identifies diversity as a strength: enriching society and the British Red Cross, and vitally important in enabling the Society to achieve its strategic priorities.

"WELL, DIVERSITY IS A STRENGTH, ISN'T IT?"

Managing within a changing external environment

The Society's managers need a good understanding of the 'external environment' in which the Society provides services and carries out its other activities if the British Red Cross is to ensure that it can achieve its lead strategic priority: delivering needs-led user-focused services.

UK Trends (1999/2000):
- Changing demographics
- 'Third Way'
- Social exclusion agenda
- Decreasing trust and confidence in public institutions
- Increased public expectations
- Increased threat of litigation
- Changing definitions of work
- Increasing influence of Europe

Trends Affecting UK Voluntary Sector (1999/2000)
- Increasing size and role of the UK voluntary sector
- Closer government/ voluntary sector relations
- Growing number of partnerships
- Changing funding environment
- Changing structures and roles within Health and Social Services
- Increased requirements for accountability and standards
- Increased emphasis on innovation
- More user involvement
- Changing profile and motivation of volunteers

The most relevant British Red Cross management behaviours and competencies for 'Managing within a changing external environment' are found under:

British Red Cross management behaviours

2 Recognise the implications of working within a charity and a voluntary organisation

British Red Cross management competencies

1 Leading people
4 Analysis, decision-making and problem-solving

Identifying changes in the environment and predicting future trends which may affect people's needs, are an essential part of the British Red Cross business planning processes. The Society takes these changes and trends into account in its strategic thinking, and you will need to consider how they affect your own area of work and plan accordingly.

The Society may periodically provide information to managers about current UK trends. You need to take such trends into account when putting together your own business plan, so that you can ensure that the work of your team remains relevant. The summary of UK and Voluntary Trends (1999/2000) (left column) makes it clear that they impact on all areas of work.

Managing in a context of organisational change

Change management is the process of moving from the current state, through a transition, to a vision of the future. It involves moving the organisation's people and culture through a similar transition so that they can develop the strategy, structures, processes and ways of working required to implement the change successfully, and to achieve the vision.

The most relevant British Red Cross management behaviours and competencies for 'Managing in a context of organisational change' are found under:

British Red Cross management behaviours

5	Take responsibility for your own decisions and actions and for your team
6	Demonstrate flexibility and open-mindedness
7	Support and share

British Red Cross management competencies

1	Leading people
4	Analysis, decision-making and problem-solving
5	Innovative and creative thinking
6	Interpersonal and communication skills

The British Red Cross has been through a period of major organisational change, which has inevitably been a painful process for some people. Having successfully created a unified Society and developed structures and systems to support this, the British Red Cross cannot just stop changing. There is an ongoing need to review and adapt structures, policies and procedures and develop improved ways of working which will achieve the best possible outcomes.

The Society's recent Strategy Review has highlighted the importance of staying relevant and adaptable in a rapidly changing environment. If the Society is to achieve its vision and its mission, and support people and communities in crisis, it cannot stand still.

Case study one

Managing in a context of organisational change

Ayo has been asked to introduce new procedures for key areas of his team's work. This will mean reorganising the team, with significant changes in some people's tasks and responsibilities. He expresses concern to Simon, his line manager, about how the team will react.

Simon shares some of these concerns, although he is convinced the changes are necessary. He tells Ayo that 'it's policy – I can't do anything about it – you will just have to tell the team what is happening, and they will have to get on with it'.

Ayo isn't sure exactly how the team should be restructured, and he isn't looking forward to telling them about the new procedures. He puts off telling the team, while he plans the new structure.

A month later, Simon asks Ayo about the team's reaction. Ayo admits that he hasn't told them yet, explaining that he wanted to get the structure right first. Simon says this is just an excuse for putting off an unpleasant task, and tells him to get on with it.

Ayo calls a team meeting and, without explaining the reasons, tells the team that they are going to be reorganised – again. He explains the new structure and procedures. As he is talking, he sees the looks passing between people. Thinking he needs to 'stamp on' any disagreement immediately, Ayo says that there is no point in getting angry about it – the decision has come from the top, and they are going to have to live with it. 'If it is any consolation', he says, 'I'm not thrilled about it either – I'm not even sure it's going to work. But I do as I am told, and you will have to as well.'

How do you generally feel about change?

Do you find it stressful? Or threatening?

Or is it a challenge and an opportunity?

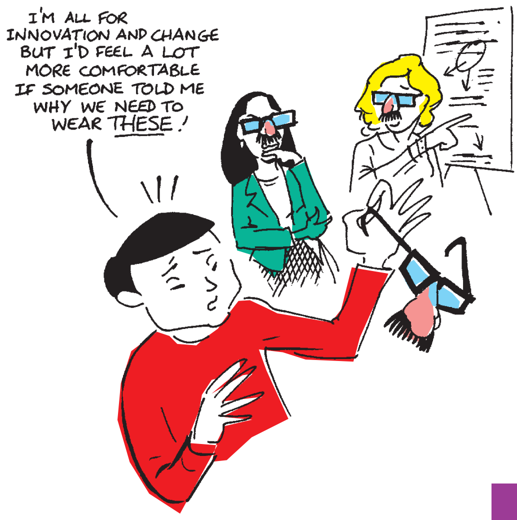
Or do you find yourself somewhere in between – and shifting from one to the other?

What are the implications for you and your team of working in an organisation which needs to change and adapt, and will need to go on changing and adapting? What can you do to help ensure that the organisation is flexible, and how can you help individuals accept change as a challenge, not a burden?

Managers need to accept that they are accountable to the organisation (see 'Accountability and levels of authority', page 43). While one would hope that managers feel committed to changes agreed by the Board and senior management, the reality is that you and your team have to implement agreed changes, even if you are not convinced that the Society is right. That doesn't mean that you cannot question change. In fact, the Society would encourage you to question anything you think doesn't or won't work, and to come up with better ways of doing things. At the same time, you must do your best to implement agreed change, convincing your team of the need to change, helping them to come to terms with it, and supporting them through the process.

'SUCCESS' – The conditions for successful change:

- **S**hared vision - does everyone understand where the change is taking us?
- **U**nderstanding the organisation - what needs to be addressed to achieve the change?
- **C**ultural alignment - make changes in ways which are close to the way things are normally done
- **C**ommunication - as soon as possible and whenever there is something to say
- **E**xperienced help when necessary – if it needs external consultants, use them
- **S**trong leadership - at the highest level who will sponsor the change
- **S**takeholder buy-in - ensure that all the stakeholders have bought in



When things need to change, the organisation needs a culture which encourages people to respond positively to change, and it needs managers who will take the initiative in making it work. Your attitude, and the way you present the need for change to others, will have a huge impact on the way they react.

Few people like change for change's sake, and a team that doesn't understand the reasons for change will probably fight against it. So your team needs to understand why changes are being introduced and what the Society wants to achieve. A team which is committed to the desired outcomes, even if it isn't convinced the changes will work, will look for ways to make them work. You need to encourage them to explore possibilities, share ideas, develop new approaches and try things out. If you have a 'can do' attitude yourself and encourage their creativity, the chances are they will make it work.

Reasons for resistance:

- loss of control
- uncertainty
- fear of the difference
- loss of power
- concerns about workload
- threat/loss of security
- misunderstandings

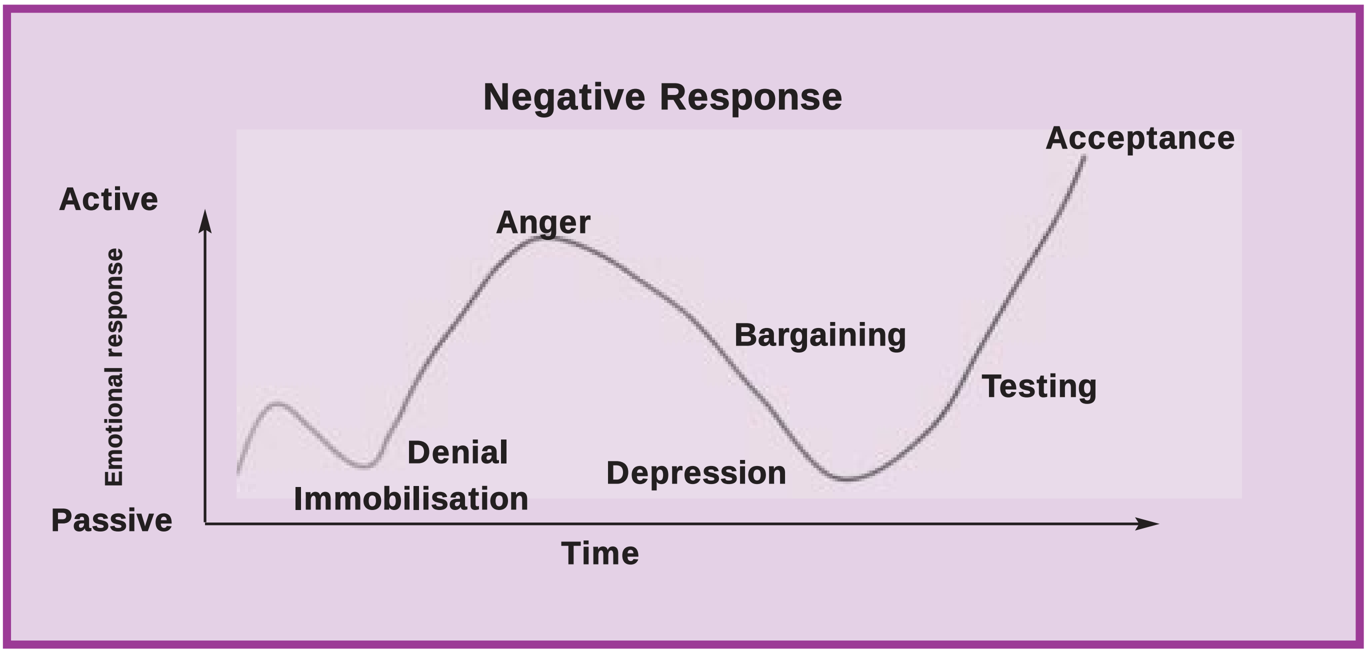
And some ways of dealing with it:

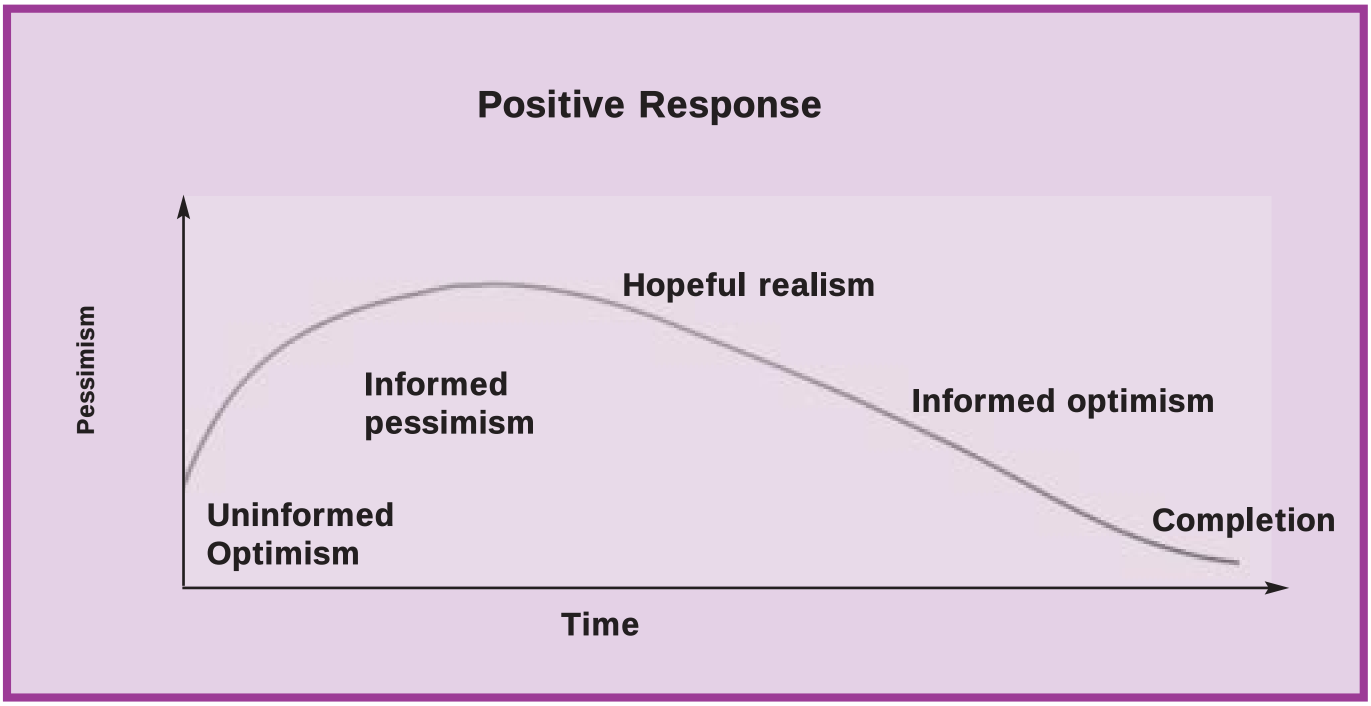
- involve people in the process
- provide training and development
- explain the change
- develop shared vision and buy-in
- explain the reasons
- address people's concerns
- listen and communicate

Managing and supporting individuals affected by change

As a manager, you should try to understand the feelings people go through when faced with change – you've probably been through most of them yourself! Some people feel invigorated, welcoming new opportunities and challenges, others perceive any change as a threat. Either way, the people in your team may go through a number of stages before accepting and working with change. All kinds of reactions should be expected. Your role is to help the individual to explore how they feel, and how they can work through these feelings.

The two diagrams overleaf illustrate the range of feelings people may go through.





'A learning organisation is one that benefits from the full brainpower, knowledge and experiences of all its people to make sense of the world. It consciously transforms itself in its search for excellence. It actively encourages the learning of all individuals who work for it and with it, at the same time implementing systems to ensure that the organisation is itself a learner. The working environment of a learning organisation is high challenge, low threat.'

The Campaign for Learning's definition of a learning organisation

Developing a learning organisation

Developing an organisation which accepts and welcomes change, not only requires a shared commitment to the organisation's vision of the future, it also requires creating a learning organisation. This can be defined in many ways, but key aspects are a sense of enquiry, a willingness to experiment and take risks, and an openness to learning and change. The Society's managers have a crucial role in facilitating and encouraging this, using all the tools available to them in the management framework.

Case study two

Managing in a context of organisational change

Ayo has been asked to introduce new procedures for key areas of his team's work. This will mean reorganising the team, with significant changes in some people's tasks and responsibilities. He expresses concern to Simon, his line manager, about how the team will react.

Simon shares some of these concerns, but is convinced that the changes are necessary. He spends some time with Ayo explaining the reasons for the changes and outlining the benefits they will bring. Ayo still has concerns about the best way to restructure the team and how to present the changes to them. Rather than advising Ayo, Simon suggests he goes away and thinks about it, but they arrange to meet a week later to talk through Ayo's ideas.

When they meet again, Ayo outlines his ideas for a revised structure and says he thinks it would be useful to discuss this with the team. He has arranged an away day to look at all the implications of the decision and discuss how they can work with the new procedures, hoping that the team will find solutions to which they feel committed.

Simon is happy with Ayo's proposal, and offers to come along to the away day if that would help. Ayo feels it might be more important to demonstrate to the team that he is personally committed to making the change work – and that might be easier if Simon isn't there.

Achieving needs-led, user-focused services

The Society's lead strategy is to deliver needs-led user-focused services.

The most relevant British Red Cross management behaviours and competencies for 'Achieving needs-led, user-focused services' are found under:

British Red Cross management behaviours

1 Uphold the Fundamental Principles and act with integrity and in accordance with the Society's values and obligations
2 Recognise the implications of working within a charity and a voluntary organisation
3 Ensure equal opportunities and anti-discriminatory practice and promote diversity
6 Demonstrate flexibility and open-mindedness

British Red Cross management competencies

2 Planning and managing projects and activities
3 Business, finance and resource management
4 Analysis, decision-making and problem-solving
5 Innovative and creative thinking

As a manager, you may have a direct involvement in identifying needs and developing, delivering and evaluating services. Other managers, while having little or no direct involvement with service provision, will still need to consider the Society's lead strategy when planning and carrying out their activities, so it is important that all managers understand the principles of the needs-led, user-focused strategy.

If you are directly involved in the provision of services, you will need to work within the Society's process for developing needs-led, user-focused services, in particular by:
- using the needs-assessment framework
- using the prioritisation framework
- using the Society's framework for developing and monitoring service standards
- involving users in decision-making about the services we provide or might develop, and
- using the guidance on evaluating users' views of services.

General principles underpinning the lead strategy

- Crisis related
- Meeting the needs of the most vulnerable
- Reflects our capabilities/skills/resources
- Time-limited
- Clear exit strategy (from individual/group need)
- Needs-led
- User-focused
- Outcome-orientated
- Timely
- Accessible
- Sensitive to individual circumstances
- Capable of working in partnership
- Continuous learning and improvement
- Cost-effective
- Distinctive contribution

Organisational principles

- Workforce fit for the purpose
- Genuine delegation of decision-making
- Mechanisms and culture to share information and learning

Identifying and assessing needs

The Society has developed a needs assessment framework to guide managers in identifying needs and making decisions about whether it is appropriate for the Society to provide services to meet the identified needs. Once a decision has been taken to provide a new service or a range of new services, you will need to develop a project plan, develop the standards, secure resources, and decide how the service will be monitored and evaluated.

Advice, guidance and support on developing and delivering needs-led, user-focused services, from:

- Service Development Department at UK Office
- Strategy and Planning Division at UK Office

Various other sections of this good practice guide are very relevant to 'Achieving needs-led, user-focused services', including:

- Managing within a changing external environment, page 34
- Managing in a context of organisational change, page 35
- Accountability and levels of authority, page 43
- Decision-making, page 69
- Managing and contributing towards projects, page 77
- Managing the performance of individuals and teams, page 88

Needs assessment framework – key questions to ask

- What is the crisis or turning point we are addressing? Can British Red Cross intervene on a short-term basis?
- What are other organisations doing?
- What are the gaps? How significant are they? What are the consequences of not addressing them?
- How well do our capabilities equip us to respond/build capacity?
- Is there an exit strategy for working with individuals/ communities?

Definitions

Being **needs-led** means that the Society and managers at a local level must be able to identify, within local communities, the needs of the most vulnerable people in crisis, and develop a response that can flexibly adapt to meet those needs.

Being **user-focused** means that the Society and individual managers must ensure that the views of current and potential service users influence decision-making at national and local level.

Users are individuals who use British Red Cross services.

User evaluation – methods of collecting feedback from current service users on the strengths and weaknesses of our service delivery, and how service delivery could be improved.

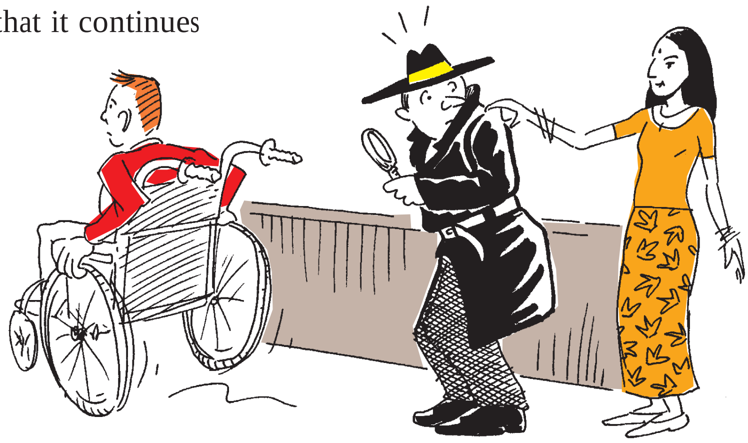
User involvement – methods of involving users, both current and potential, in operational and, where relevant, strategic decision-making.

Monitoring and evaluating services

When monitoring and evaluating a service, you will need to consider such questions as:

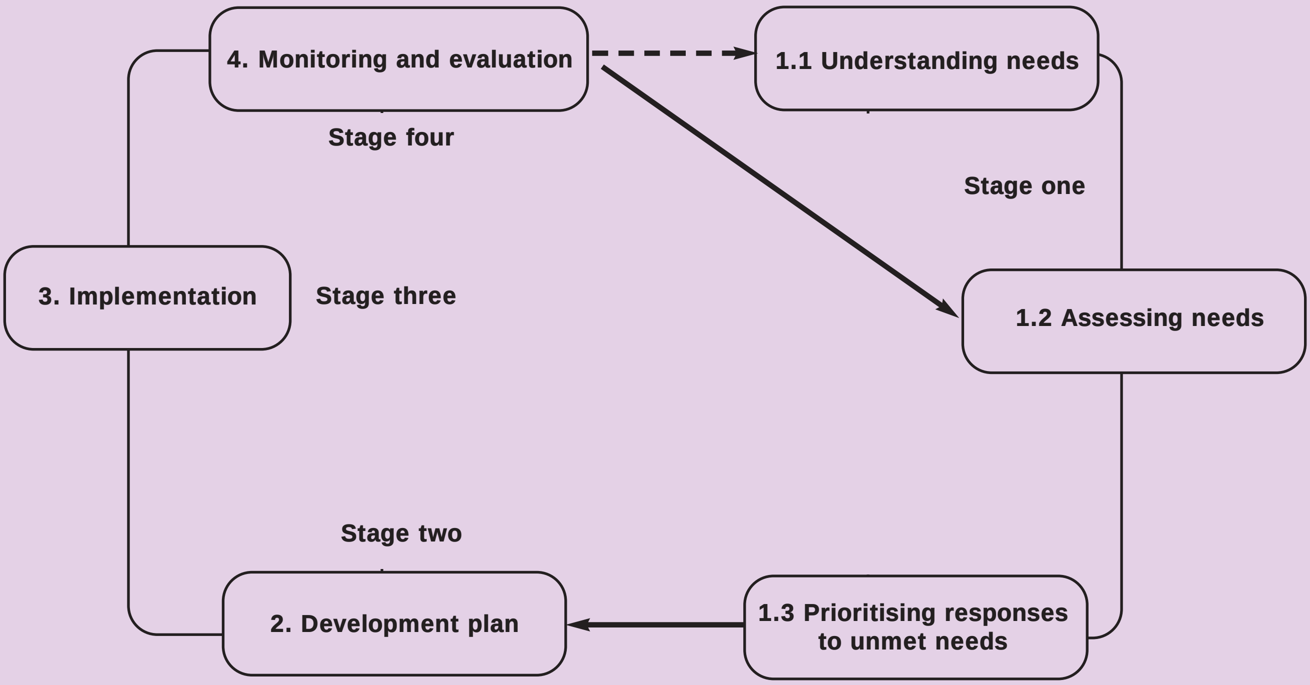
- have the aims been met?
- is the service still relevant for the British Red Cross to provide?
- does the Society still have the capability to provide it?
- should the Society continue to provide the service, or have the priorities changed?
- what do service users think of it?
- what do partners think of it?
- what changes, if any, would be needed to ensure that it continues to meet identified needs?
- are the standards being met?
- do the standards themselves need to be reviewed?

The following diagram illustrates, in a simple form, the cyclical processes required to identify, deliver, monitor and evaluate the provision of services, and ensure high quality, flexible, needs-led, user-focused services.



"THIS ISN'T QUITE WHAT I MEANT WHEN I SAID WE NEED TO MONITOR OUR SERVICES."

Process for developing needs-led, user-focused services



Accountability and levels of authority ...

All the Society's managers, staff and volunteers are accountable to the Society and the Board of Trustees through the line management structure. The Society itself is accountable in different ways to its various stakeholders, for example to service users and donors, and also to the Charity Commissioners (see page 26).

The most relevant British Red Cross management behaviours and competencies for 'Accountability and levels of authority' are found under:

British Red Cross management behaviours

1 Uphold the Fundamental Principles and act with integrity and in accordance with the Society's values and obligations

2 Recognise the implications of working within a charity and a voluntary organisation

5 Take responsibility for your own decisions and actions and for your team

British Red Cross management competencies

1 Leading people

2 Planning and managing projects and activities

3 Business, finance and resource management

4 Analysis, decision-making and problem-solving

Case study one

Accountability and levels of authority

Meg makes it clear during Masood's induction that he is to refer to her on all but the most minor decisions. Since this is his first management role, and the first time he has been responsible for managing a budget, Masood accepts this.

Some months later, Masood is still seeking Meg's approval for almost all decisions. Meg feels that this should no longer be necessary – he could easily decide many of the things he asks about himself. The next time Masood comes to see her, Meg is very busy and snaps at him, with some irritation, that 'it really is time you started to take responsibility for your own decisions'.

Masood is now unsure about how much authority he has. Over the next weeks, he finds that he is worrying about decisions, and sometimes feels he would like to have Meg's 'OK' before going ahead.

One day, Masood goes to see Meg to tell her about a partnership agreement he has negotiated. He is feeling pleased with himself, and he is sure it will bring enormous benefits to everyone. But Meg is furious! 'You've actually signed this?' she asks. 'But this means that you've committed us for the next five years! Didn't you even think of asking me first?'

Masood is upset. 'The cost this year is in the budget', he says. 'It's just that it gets spent a bit differently, and we've already agreed to put in for the same next year. I don't see what the problem is.' 'The problem', says Meg, 'is that neither you nor I are authorised to make a commitment like that on behalf of the Society.'

You are accountable to your line manager for your decisions and actions. You are also accountable to your line manager and to the Society for the decisions and actions of your team, and your staff are accountable to you.

Your level of authority defines the decisions you are authorised to make without reference to others.

Managers at all levels take important decisions on the Society's behalf, and must have a clear understanding of their level of authority. Each manager needs clarity about the decisions they are – and are not – authorised to take.

You need that clarity from your manager and your team needs it from you – they need to know their boundaries and their degree of autonomy.

The Society's strategy of devolving responsibility for services is designed to empower managers to make decisions and to reduce the constant need for prior approval before acting, while maintaining acceptable levels of risk.

In many cases, authority to proceed will be through the business planning and monitoring process, as actions described in the plan and the associated budget will have been approved previously by senior and line management. If you wish to initiate unplanned activities, i.e. any actions which do not appear in the business plan, or to use resources beyond those in the agreed budget, you will need to obtain authority at a higher level. In an Area, for example, unplanned activities can only be initiated by the Operations Director and authorised by the relevant UK Director.

In other cases, questions about whether you have authority to make decisions or to act will be answered by referring to your job description or to relevant policies and procedures.

Questions of authority and accountability also involve making judgements. You may be authorised to carry out a particular project because it is in your business plan, but still need clarity from your manager about the detail of your authority. Can you decide for yourself about how the project will be implemented? Does your manager want to approve your project plan? Are you confident that you will know when you need to refer to your manager or other people?

You also need to clarify levels of authority when you delegate to members of your team. Is it appropriate to devolve authority to particular individuals? Are they competent to take decisions of this kind? Do they have sufficient confidence and experience? Are you confident that they will know when to involve you and/or others in decision-making?

Supporting Strategic Priority No. 1: Devolving responsibility for services: Within the framework of the Society's strategy, policies and standards, the key role of Branches is the identification of need and the design and delivery of services to meet those needs. Branches will be left to the maximum extent possible to get on with that job, with decision-making authority and accountability via the monitoring of performance rather than the constant need for prior approval. This will speed up decision-making and ensure sensitivity to local circumstances.

Reading this might make you cautious about devolving authority to members of your team. While you should always think carefully before authorising others to take responsibility, you need to take into account that the Society devolves responsibility to local levels in order to speed up decision-making and ensure sensitivity to local circumstances. The Society also encourages managers and others to take reasonable risks in the interests of learning, flexibility and innovation.

Clarifying overall decision-making authority and accountability with your team will significantly reduce the number of occasions when they need to seek your prior approval before acting, and you can then manage their authority and accountability through ongoing performance management.

The key issues for you are how to manage devolving authority and responsibility, and the mechanisms you employ to monitor performance.

As for many management tasks and responsibilities, your most important tools are induction, one-to-one supervision and appraisal. Your supervision meetings with your staff give you the opportunity to clarify how much authority they have. Every time you delegate a task to an individual, you need to make sure that they understand their authority, and know when to refer back to you.

With a new employee, you will need to clarify overall levels of authority during the induction period, and may need to spell out their authority in relation to individual tasks in some detail. After a time, you will develop a shared understanding of the boundaries, and spend less time on this.

"I DON'T THINK WE ACTUALLY DISCUSSED THIS OPTION IN YOUR SUPERVISION!"

Accountability:

You are accountable to the Society, through your line manager, for:

- your work and your decisions
- the work of your team and their decisions within the boundaries set by your manager
- your team are accountable to you for their work and their decisions - within the clear boundaries that you set

Delegating authority:

When delgating:

- clarify overall authority levels during induction, and review them as appropriate in supervision
- clarify details of authority when delegating tasks and projects
- ensure accountability via monitoring of performance
- ensure staff know they can still refer to you if they are unsure
- take 'reasonable' risks and allow and encourage your team to do the same
- accept 'understandable' mistakes – but make sure they - and you - learn from them

Section 3

Your team need clarity, but they also need your support. When you delegate authority, you must ensure that the individual knows that they can still refer back to you if they are unsure. They also need to know that they have your support if they get something wrong. They are accountable to you, but you must also accept responsibility for their decisions and actions – you are accountable to your manager for your team. Two things may have gone wrong: the individual may have made a poor decision, and you may have been unwise to delegate the authority. But remember that the Society is happy to allow – and even to encourage – people to take reasonable risks, and it accepts justifiable mistakes.

If one of your team makes a poor decision, you need to spend some time with them, analysing what happened and why, and ensuring that they learn from it. In more serious situations, for example if you feel they acted unreasonably or irresponsibly, you might have to consider setting different boundaries on their authority and/or initiating disciplinary procedures.

Case study two

Accountability and levels of authority

Meg makes it clear during Masood's induction that he is to refer to her on all but the most minor decisions. Since this is his first management role, and the first time that he has been responsible for managing a budget, Masood accepts this.

Meg regularly reviews his authority to make decisions without reference to her during their one-to-one supervision meetings, gradually delegating more authority as she grows to trust him. Masood goes back to her if he isn't clear whether he has authority to decide for himself or if he isn't confident that he is making the right decision.

After some months, Meg feels that Masood needs to develop his confidence in his own decision-making. She encourages him to use his initiative, and reassures him that if he does get it wrong, it won't be the end of the world. Masood responds well to this, and Meg feels he is getting more confident, and taking on more responsibility.

Shortly afterwards, Masood goes to see Meg to tell her about a partnership agreement he has been working on. Ordinarily, he would have felt that this agreement was within his level of authority, but when he thinks about it, he decides that because the agreement commits the Society for five years, he cannot finalise it without Meg's approval. When Meg looks at the agreement, she says he was quite right to come to her. She confirms that he only has authority for items within his agreed business plan and budget, and tells him that they will have to get approval from her line manager, as she isn't authorised to make that kind of decision either.

Choosing the most appropriate management style

Management style can be defined as the approach used by managers in the completion of their work.

The most relevant British Red Cross management behaviours and competencies for 'Choosing the most appropriate management style' are found under:

British Red Cross management behaviours

3	Ensure equal opportunities and anti-discriminatory practice and promote diversity
4	Recognise and value the contribution of others
5	Take responsibility for your own decisions and actions and for your team
6	Demonstrate flexibility and open-mindedness

British Red Cross management competencies

1	Leading people
4	Analysis, decision-making and problem-solving
5	Innovative and creative thinking
6	Interpersonal and communication skills
9	Managing and developing individuals
11	Team-working

Section 3

Case study one

Choosing the most appropriate management style

During a one-to-one supervision session, Dave tells Jo that he is going to allocate an important task to her. Although Jo is very able and experienced and the task is within her competency, Dave spends a considerable amount of time telling her exactly how he wants the task done.

Jo doesn't say anything to Dave, but she feels irritated. It isn't just that Dave doesn't trust her to make even the simplest decision, he obviously doesn't feel she could contribute to planning the task. When she begins work on it, she quickly realises that there would be a better way of doing it - not only quicker, but also producing more information and a better result overall.

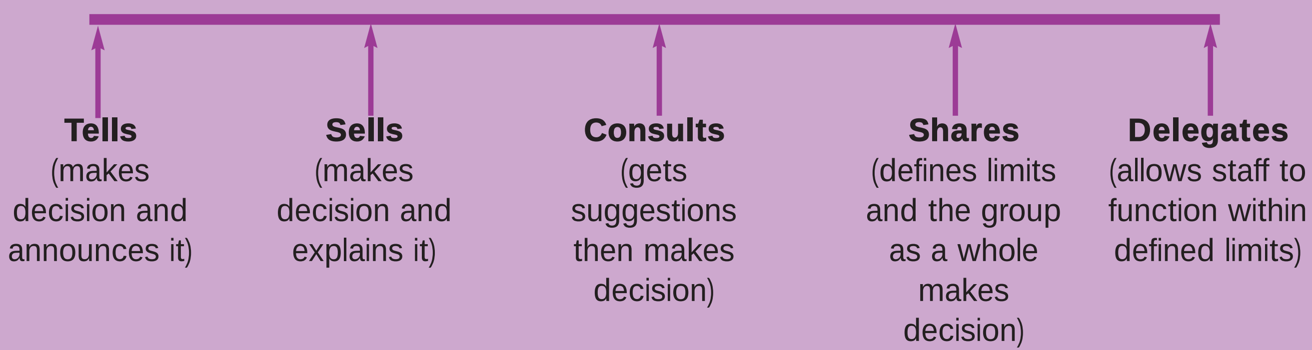
She thinks about just doing it her way without asking Dave, but knows he would be angry about that. She also thinks about asking to discuss her ideas with him, but since he has given her clear instructions about how to do it, even that might annoy him. After a while, she sighs and settles down to do it his way – after all, that's what he told her to do. She finds it difficult to summon up much enthusiasm, and when she has finished, even she knows she hasn't done it all that well.

As you go about your tasks, you probably use a variety of different management styles. You may sometimes be directive, telling staff what they must do and how. At other times, you might consult with your team, inviting their views and ideas, and involving them in decision-making. Neither approach is necessarily right or wrong – the most effective approach will depend on the situation, the individual(s) and your relationship with them.

This means that you need to be able to use a range of different styles and techniques, selecting the most appropriate for each situation. In an emergency, or when an immediate decision is required, you will probably tell people what to do, rather than consult – you don't consult with your colleagues if the place is on fire, you move! However, if you have a number of different options to choose from, involving the team in exploring these might lead to a better result, and a more committed team. Using the most appropriate management style for the situation and the individual will help create an environment where everyone can flourish.

The chart below illustrates this range of styles.

Tannenbaum and Schmidt describe this range of styles as a management continuum:



Preferred management styles

It is not always easy to choose the best approach, and many managers have a preference for a particular style, perhaps as a result of the assumptions they make about other people (see MacGregor's Theory X and Theory Y, on page 49), or because it is a style used by someone they see as a good role model. They may simply feel more comfortable with some approaches. If you recognise this in yourself, you may need to make a point of thinking about your approach and trying to move out of your comfort zone more often, or a bit further. You should be comfortable with all management styles, so that you can adapt your style according to the situation and the needs of your team. If you use a consultative or sharing style, or delegate decision-making when it is inappropriate to do so, your team may feel they lack direction. But a style which is too authoritarian, or a reluctance or inability to delegate when it is appropriate to do so, may reduce the contribution your team can make, restrict their personal and professional development, and make them feel stifled.

Your team's preferences

Just as you may feel more comfortable with some styles, members of your team will also have individual preferences. If you ask them, you might find that one person would prefer you to be more directive, while another may be motivated by having more input into decisions. If you know their preferences it will help you to decide the most effective approaches.

Making assumptions about your team

Douglas MacGregor's work (see below) may imply that the higher your expectations of your team, the better they are likely to perform. That certainly does not mean that you must always consult, share or delegate. But you may find that the team achieves more if you involve them more, and such approaches also encourage and facilitate learning and development.

Douglas MacGregor's research showed that managers tend to operate with one of two sets of contrasting assumptions about people, which he called Theory X and Theory Y. (*The Human Side of the Enterprise*, published 1960)

He suggested that if you believe these assumptions about the people you manage, they will tend to behave that way. (Self-fulfilling prophecies!)

Thus, if you believe people try to avoid working, your staff may start doing just that!

Theory X

- People dislike work and will avoid it if they can
- People must be forced to put in the right amount of effort
- People would rather be directed than accept responsibility, which they will avoid
- People are motivated mainly by money
- Most people have little creativity, except when it comes to bending the rules!

Theory Y

- Work is necessary to human growth and people enjoy working
- People will direct themselves towards an achievable target
- People seek and accept responsibility under the right conditions
- People want to realise their own potential
- Creativity and ingenuity are widely distributed and grossly underused

Section 3

Case study two

Choosing the most appropriate management style

During a one-to-one supervision session, Dave tells Jo that he is going to allocate an important task to her. He knows Jo is very able and experienced and thinks the task is well within her capability - if he explains what outcomes he requires, she will be able to explore the various options available to her and find a way that works.

Because this task is a bit different to her other tasks, he describes what he needs, and asks Jo whether she would be happy to decide how to do it herself, or wants a bit more input from him. Jo thinks about it and decides that she would like to explore the options herself but, because it is a new piece of work, she would like to check back with him before actually doing it - just in case she is wrong. Dave says he is happy with this, and when she returns with a recommendation and explains why she chose this option over the alternatives, he completely agrees with her.

This is really quite a boost to Jo’s confidence and she is full of enthusiasm for the task, which she completes very quickly. Dave is very pleased with the results she produces and congratulates her on her good work.

[Remember that this is only ‘right’ because it is right for Jo and the work is within her capabilities – it will not always be right for you and your team.]

4 'Doing the job'

‘Doing the job’

The title of this section is taken from the ‘doing the job’ box in the centre of the management framework diagram (see Appendix 1). It provides practical guidance on applying the framework and the activities you carry out as you implement it in the management of your team – outlining what the Society expects you to do, and how.

The first expectation is that you read this guidance, and then refer to it regularly. You will certainly want to read and refer to this guide if you are taking on a management role for the first time, or if you are new to the Society, even if you are already an experienced manager. But established and more senior British Red Cross managers also need to be familiar with this guidance, and to refer to it when appropriate, for example during one-to-one supervision meetings or when working to identify development needs. It is designed to assist senior managers to provide support to their team when they are implementing the management framework and gaining the necessary British Red Cross management behaviours and competencies.

Remember that the Society does not expect managers to follow every word of this guidance slavishly – it is not a rule book.

There are many different ways to be effective as a manager, and the Society needs and values creativity, innovation and diversity.

It does not need all its managers to be clones!

The Society's expectations of managers

- you are expected to ensure that your work, and that of your team contributes towards the Society's vision, mission and corporate objectives
- you are expected to follow the various British Red Cross policies and procedures referred to in this guidance. (Note that you have some discretion over the way you implement procedures as long as you implement policy effectively.)
- you are expected to implement the British Red Cross management framework as described in this guide
- you are expected to uphold the Fundamental Principles and ensure that your behaviour is consistent with the British Red Cross management behaviours
- you are expected to develop your knowledge and skills as described in the British Red Cross management competencies
- you are expected to develop any specialist or technical knowledge and skills required for your post, and to keep these updated as required

Managing yourself

The manager's role is a complex one. You need to balance a variety of roles, tasks and activities, prioritising your work in a way which best achieves the organisation's and your own objectives.

The most relevant British Red Cross management behaviours and competencies for 'Managing yourself' are found under:

British Red Cross management behaviours

5 Take responsibility for your own decisions and actions and for your team. (The text of this behaviour – see Appendix 2 – is written to apply to your management of your team, but many of the behaviour statements can also be applied to managing yourself)

British Red Cross management competencies

7 Managing and developing yourself
9 Managing and developing individuals

Case study one

Managing yourself

Amy arrives in the office on Monday morning. She glances at the pile of stuff in her in-tray and checks her diary: back-to-back meetings most of today and tomorrow, several on Wednesday, and then she is off on that two-day course. She also wanted to fit in the supervision meetings with two of her team which she cancelled last week – but that will have to wait, even if they are several weeks overdue – she's got the report to write for John, her manager, and that is already two weeks late.

John drops in to say good morning, and see how things are going. They chat for ten minutes, then he asks her to read through the discussion paper he's been working on; 'I'd appreciate your comments by Friday, can you do that?' As he is leaving, he tells her he has volunteered her to join a new working group: 'it will be good experience for you, and I know it will be interesting; Chan will give you the dates and papers.' Amy sighs, picks up the phone and cancels the training course. Then she finds the papers for the first two meetings, and dashes off down the corridor.

When she gets to the meeting, about ten minutes late, she finds they have already started. She looks at the agenda, and remembers that she had promised to put together some thoughts on the implementation plan. Oh, well, she thinks, I'll just have to wing it!

Managing your workload

You may feel that you are working under considerable pressure most of the time: the work needs to be done quickly but you always seem to be in meetings and when you finally sit down to tackle a task, there are constant interruptions. The constant flow of urgent tasks stops you doing things you know are important, and the quality of your work may suffer.

Are you good at managing your own stress? The Society provides training on identifying and managing stress – discuss your training and development needs with your manager.

If this sounds familiar, you need to take time out to think about how you prioritise your work, manage yourself and manage your time. You might also think about whether you need to manage your manager! (See 'Managing your manager' page 114.)

You need to share your time appropriately between:

- work on the tasks you carry out personally – tasks which require your specialist knowledge or expertise and cannot be delegated
- work in managing the tasks being undertaken by your staff, e.g. agreeing plans, discussing progress, and dealing with any problems
- work in supporting and developing your staff and managing their performance
- communicating with a wide range of people, in meetings and face-to-face contacts
- your own training and development.

So how do you prioritise your work? The first question to ask is whether you actually have to do all the tasks on your list. Are they all essential? If so, do you need to do them yourself? Which can you delegate to other people? (See 'Delegation', pages 45 and 110.)

Setting priorities

Decisions:
- the order in which jobs are done
- how much time you spend on each

Urgent jobs:
- don't also have the highest pay-off
- are often given a priority they do not deserve

Important jobs:
- are the ones which help you achieve your objectives

Mistakes:
- not distinguishing between 'urgent' and 'important'
- doing what you like doing, not what needs to be done

Do you enjoy being driven by events, crisis and fire fighting … and find time management techniques, e.g. planning and prioritising, hard work or boring?

Pareto's Principle: The 80/20 rule:

20% of the time available produces 80% of the results

80% of the time available produces 20% of the results

Some ideas for organising yourself:

- create a weekly plan to give yourself:
  - enough time for major tasks
  - an overview (so you can make changes)
- translate this into a daily to-do list (do it for the next day before you go home)
- be realistic!
- review your list throughout the day
- ask yourself if you have to do things, or if someone else could
- group related activities together
- work on important tasks each day

Think about which tasks are important, and which, although urgent, are less important. How much time do you spend on trivial matters? Do you write letters, when a phone call would do? Do you waste time finding things because your filing system is badly organised? Could you save time by drafting the week's correspondence in one afternoon, rather than replying to letters as they come in? Every manager has their own systems and time management 'tips'. Do yours work for you?

If, when you have done all that, you still have more than you can fit into your day, ask yourself whether you need to be more assertive. Is your manager aware that you are genuinely over-stretched? Can they help you to prioritise? Could you sometimes say no, when asked to do something? These are all issues which you can and should raise in your regular one-to-one supervision meetings with your manager. And if you think you need training in order to be more efficient and effective, let your manager know.

Managing your own professional and personal development

See 'Developing your team for effective performance in their existing roles', page 118 for more information about training and development.

You and your line manager have a shared responsibility for your training and development. The Society's and your first priority is to ensure that you have the knowledge, skills and behaviours for effective performance in your current role. When your work plan has been agreed, you should take time to discuss any training and development needs for the activities in the plan, and draw up a training and development plan (see page 120). You are the best person to identify your own needs, although constructive feedback from your manager will be very helpful. And, because you know how you learn best, you are also the best person to research the training and development options available to you, e.g. coaching, shadowing, training courses, etc.

Once you have agreed the training and development plan, make sure it happens – it is easy, when the work is piling up, to make your own training and development the last priority. Don't!

See 'Personal and career development' page 126 for more information.

You may also be seeking training and development in order to achieve your longer term career aspirations, or to enhance your existing role. Your training and development for these aspirations should be agreed with your manager during your appraisal and then compiled as a 'career and personal development plan'.

Case study two

Managing yourself

Amy arrives in the office on Monday morning. She glances at the pile of stuff in her in-tray and checks her diary: back-to-back meetings most of today and tomorrow, several on Wednesday, and then she is off on that two-day course. She also wanted to fit in the supervision meetings with two of her team which she cancelled last week, and she's got the report to write for John, her manager. She spoke to John about that last week, because it was already overdue, and although he agreed to an extension, it is still urgent.

Amy decides she really needs to prioritise - she must make time for the two supervision meetings, and her training course is important. Perhaps one or two of the other meetings could be postponed. This problem keeps arising, so she decides to block out certain days when she won't be available for meetings. If she works really hard to keep those days free, unless a genuine emergency comes up, it should work. She will try it for a month or two anyway.

John drops in to say good morning, and see how things are going. They chat for a few minutes, then he asks her to read through the discussion paper he's been working on; 'I'd appreciate your comments by Friday, can you do that?' Amy says she'll be happy to, but reminds him that she is out on Thursday and Friday, so it would mean the report will be further delayed. He agrees that the discussion paper can wait until the following Friday. As he is leaving, he tells her he has volunteered her to join a new working group, which he thinks would be interesting and good experience, but he is now wondering whether she will have time - would she like to do it? Amy asks John if they could arrange a meeting to help her prioritise, to see if she can fit it in – she hasn't got time to discuss it now, as she has a meeting to go to. Then she finds the papers for the first two meetings, picks up the notes on implementation she made for the first one, and dashes off down the corridor.

She arrives just as the meeting is about to start, but settles down quickly – at least she is well prepared.

Communicating with others

Good communication is fundamental to effective management. For managers, it involves sharing information, and knowledge and skills, with your colleagues and your team. You are also an ambassador for the organisation, its objectives, and its principles. If you communicate effectively with your colleagues, staff and volunteers, and with the public, you will be sending out a powerful message about what the British Red Cross does and what it stands for.

The most relevant British Red Cross management behaviours and competencies for 'Communicating with others' are found under:

British Red Cross management behaviours

1 Uphold the Fundamental Principles and act with integrity and in accordance with the Society's values and obligations
2 Recognise the implications of working within a charity and a voluntary organisation
4 Recognise and value the contribution of others
6 Demonstrate flexibility and open-mindedness
7 Support and share

British Red Cross management competencies

1 Leading people
6 Interpersonal and communication skills
7 Managing and developing yourself
9 Managing and developing individuals
11 Team-working

Effective communication involves:

- encouraging the flow of information and feedback within your team
- sharing information, learning and good practice with others
- using feedback to inform behaviour and improve standards
- developing good personal and working relationships with others
- managing the 'interface' between your team and other teams within the Society
- building partnerships, both internally and externally.

It will help you to:

- manage your team effectively
- involve your team and gain their commitment
- represent your team and the Society to others
- identify and meet clients' and stakeholders' needs and expectations
- achieve the Society's strategic priorities
- assist the Society to develop into a learning organisation.

Case study one
Communicating with others

During a one-to-one supervision meeting Veena gives Bob a new task which is part of a larger project she is managing. Bob is unsure of the overall aim and asks Veena to explain what the project is about and how it fits in with work he thinks another department may be doing. Veena says she hasn't got time and, as the task is simple enough, he really doesn't need the background stuff. Bob asks whether he should talk to Kabir, his 'counterpart' in the other department, 'just to make sure we aren't duplicating each other's work'. Veena tells him not to waste his time, adding that she wants to keep the project within the team.

A couple of days later, Bob meets Kabir in the corridor and Kabir mentions a few difficulties he is having with his project. This makes Bob even more concerned about duplication. Knowing that Veena would be angry, he doesn't tell Kabir what he is doing, but he goes back to Veena to tell her what Kabir said. He suggests that it might be helpful if she spoke to Kabir's manager, so both departments know what the other is doing. Veena reacts crossly, reminding Bob that she told him not to talk to Kabir. Bob says he doesn't understand why Veena is so reluctant to discuss things with other managers. Veena replies that when she wants feedback from Bob, she will ask him.

Later, when the project is nearly completed, Kabir's manager asks Veena for a meeting, and they find out that the two departments have been duplicating their efforts in a number of areas.

As a manager, you need to communicate effectively with a range of different audiences: your manager, your team, and other managers and teams, i.e., 'up', 'down' and 'sideways'. You may also need to communicate with volunteers or audiences outside the British Red Cross, e.g. service users, or partners in other organisations or the statutory services. For each of these, you will need to choose the most appropriate methods and techniques:

- one-to-one – formal meetings and informal discussions
- in groups – project meetings, team meetings, etc – you may be managing the meeting, facilitating discussion, or contributing as a group member
- formal or informal presentations
- in writing – reports and discussion documents, letters, memos, e-mail and faxes
- by telephone.

If you need help with these or any other areas, e.g. report-writing, meetings, public speaking, delivering training, IT skills, etc, discuss your development needs with your manager. Various courses are available.

> If we were intended to talk more than listen, we'd have been given one ear and two mouths!

Sharing information and ideas within and across teams is a vital part of learning for individuals and for the organisation as a whole, and essential for effective performance and performance management. It is a two-way process. Listening is as important as talking, and it should be an **active** process of laying aside assumptions about what someone is trying to say, listening to what they actually say, and checking back that you have heard and understood correctly.

'Golden Rules' for effective team briefing:

- hold briefings regularly once a month
- schedule meetings well in advance
- hold briefings in the workplace, during working hours
- make sure they last no more than 30 minutes
- avoid interruptions
- make them interesting
- structure the sessions, to cover:
  - progress – on team goals and targets
  - policy – any new policies, management decisions, procedures, guidelines, etc
  - people – individual achievements and matters affecting team members
  - points for action – who needs to do what, and when

Communicating with your team

This is an essential part of your everyday work as a manager. You cannot achieve your objectives without your team's contribution and cooperation, nor can you work well with other teams unless you communicate effectively with them. The benefits of good practice are clear:

- a better informed team
- a team which is more able to accept and implement change
- a shared view of what is going on, and where the Society and the team are going
- a greater sense of involvement, resulting in improved motivation and job satisfaction
- greater accuracy and consistency of information, leading to improved trust and confidence in each other, and with other teams
- reduced reliance on the grapevine
- for you personally, greater satisfaction in seeing your objectives achieved and, as a result, greater confidence in your leadership skills.

See also 'Developing a team-working approach and the effectiveness of the team as a whole', page 110.

The team briefing system is an important and practical tool for internal communications. The system works by cascading senior management decisions and information down the management line to reach as many people as possible within the shortest possible time, and passing information back up the line. But, even more important is the opportunity to exchange information face-to-face. When the system is properly used, i.e. regularly and consistently, you can be sure that you and your staff are being kept fully informed about developments affecting the whole organisation, and updated on matters of more local interest. Team briefing sessions covers items from senior management (the core brief), and could include items of particular relevance to the team or Department (local divisional, departmental and section briefs). Team briefing is a two-way process: information is cascaded down throughout the Society, with feedback from discussions flowing back up the management line.

In addition to structured communication processes such as team briefings and one-to-one supervision, you should make full use of other opportunities and less formal communication techniques to communicate with your team and encourage them to communicate with each other. These methods could include:

- regular team meetings
- start of the week team reviews: sharing and celebrating achievements and success; discussing problems; reviewing learning; anticipating issues and events in the coming week, and sharing concerns
- diary checks – who is doing what and when; how will you keep in touch?
- written communications to complement the spoken word – using memos, notes and e-mails to back up a discussion, develop an issue, describe the current situation or open up new issues.

'Walking the talk'

This is about communicating your commitment to the Movement's Fundamental Principles, to the Society, and to its strategic priorities and ways of working, and developing a similar commitment in others. For managers, it also means demonstrating a commitment to the British Red Cross management behaviours and competencies. Words alone will not achieve this – this is about being a role model and behaving in ways which confirm what you are saying. 'Walking the talk' also means communicating a vision and setting an expectation of quality and high standards.

"IS THAT WHAT THEY MEAN BY 'WALKING THE TALK'?"

Communicating with external audiences

Communicating with external audiences, including the general public, through the media, is a key aspect of the Society's strategic priority of 'Communicating a compelling Red Cross message'.

Managers should, however, bear in mind that communicating the Red Cross message involves much more than contacts with the media. You should also 'walk the talk' when communicating with non-Red Cross audiences, putting across the 'Red Cross message', sharing your belief in the organisation and its values and presenting a positive and professional image of the Society and its work. Do also encourage your team to tell others about the Red Cross, its work and its values. You should bear in mind that people's perceptions of an organisation are often shaped by the behaviour of individuals who work for it, as well as by what they say and do. It is important to communicate this to your team, and work to ensure that their behaviour reinforces positive perceptions of the Society.

Presentations to external audiences and other contacts with the public

Managers and other staff and volunteers are often asked to make presentations about the International Red Cross and Red Crescent Movement, the British Red Cross, or particular aspects of its work, to various external audiences, e.g. community groups or schools. Individuals making such presentations are, in effect, the public face of the Movement and the Society, and can have a significant impact – positive or negative – on public perceptions of the organisation. You may be giving the presentation yourself, or making decisions about who would be the best person to do it. Either way, you must do what you can to ensure a positive outcome – for the audience and for the Society.

Similar questions may need to be asked about other situations in which individuals interact with external audiences, for example how the Society's trainers present the organisation when delivering courses, and indeed, what messages the people who work in British Red Cross shops and volunteers and staff who provide a service in the community are giving about the Society.

Because every action or decision spreads a message, you should always consider the wider implications of your decisions, and the work of your team, on external audiences.

Refer to the British Red Cross public relations manual for advice and guidance.

Some important questions to ask

Do I – or does the individual involved – have:

- enough knowledge and understanding of the specific subject?
- sufficient general knowledge of the Society and its work to answer questions which might arise?
- sufficient knowledge of the Movement, and its Fundamental Principles and ways of working, to give appropriate answers to the difficult questions about international activities which so often arise?
- the confidence to say 'I don't know'?
- good public speaking/ presentation skills (training is available)?
- access to the appropriate materials?
- sufficient understanding of the audience and its needs?
- the personal attributes and ability to present a positive image of the organisation and its work?

If you are involved in planning an activity or programme, you will need to determine:

- who is going to be affected by your decisions
- how to inform or engage with these groups and individuals
- how to market and promote your ideas, plans and initiatives
- how to obtain and use feedback

and then make sure that the information you wish to disseminate reaches the targets you have identified, and achieves the impact and the results you require.

Communicating with, and through, the media

The media provide a very effective way of communicating with external audiences. National and local television, newspapers, radio, etc, can spread our message to audiences we could not hope to reach in any other way. They are generally very supportive of the British Red Cross and see the Society as a good source of news, and the Society devotes a considerable amount of money, time and effort to developing and maintaining good working relationships with them.

> The Communications Team at UK Office and communication specialists in the territories can advise on media strategy and best practice, and will also be able to help identify the most appropriate person to speak to the media on a particular subject.

Communicating with the media is a specialist role, but all managers are encouraged to ensure that best use is made of opportunities to disseminate information via the media.

The Society has designated certain individuals to speak to the media, provided them with the necessary training, and ensured that they are sufficiently briefed to speak on the Society's behalf.

However, any manager could find themselves talking to the press, just by picking up the telephone! How you respond is very important – you must be friendly and helpful, while ensuring that you do not say anything that might damage the Society and its reputation. The following simple tips may be helpful:

- Make the caller feel that you welcome their interest in the Society.
- Establish who they are and which newspaper/media they represent.
- Confirm the nature of the enquiry and the timescale they are working to.
- Decide who should respond to the query – even if you know the answer, it may be more appropriate for someone else to respond, or for you to take advice before replying.

Giving feedback:

- make it timely – as soon as possible after the event
- remember that immediate praise or a quick reprimand may be as effective as more detailed feedback later
- be specific and provide clarification if required
- only give feedback on things people can actually change
- 'own' your feedback – 'I think/feel ….'
- be sensitive to their feelings
- allow the individual time to respond or, if appropriate, to go away and think about what you have said and come back with their response
- accept that you may be wrong!
- when giving negative feedback, say something positive as well (ideally a positive-negative-positive 'sandwich')

- Say that you would like to help, but you are not the best person to talk to them. The simplest reasons are the best – this isn't your area of work; you do not know all the facts, etc.
- Be friendly and polite, and make sure you do not sound defensive or secretive.
- Take the caller's contact details and either offer to transfer them to the appropriate person (if you know who that is and they are authorised to take calls from the media) or promise to pass the query on to another person when you have established who should take the call.
- Thank them for their call.
- After the call, identify an appropriate person to speak to the caller as quickly as possible, contact them immediately, and brief them on the call.

Remember that the media are a vital tool – and a cost-effective one – to help get information to our supporters and the general public about our work. Without the coverage we receive in the press and the broadcast media, and increasingly also on-line sources, our role and our response to people in crisis could never be so widely recognised.

Giving and receiving feedback

Everyone is entitled to constructive feedback on their work and their behaviour. You must ensure that you give honest, constructive and effective feedback to your team – when they seek it from you, and sometimes when they don't!

Supervision and appraisal are all about giving – and receiving – feedback. Your staff need to know what they have done well, and to receive recognition. They also need to know what they could have done better and how they can improve. Inexperienced managers often shy away from giving negative feedback, because it is difficult

"THIS ISN'T QUITE WHAT I MEANT WHEN I ASKED YOU FOR FEEDBACK!"

and they do not want to upset people. But if you don't give negative feedback when you should, you are denying the individual the opportunity to develop and you cannot expect any improvement in their work. (See also 'Managing poor performance', pages 105-108.)

Actively seek feedback from others about your own performance. Feedback will tell you about your strengths, and about things you could improve or stop doing, and will help you to become more effective as a manager.

Managing meetings

Meetings can serve a variety of purposes – or have no real purpose at all! If you have been asked to manage a meeting, you need to be clear about the objectives and the outcomes you and others require. If the purpose isn't clear, you should review whether the meeting is actually necessary.

Meetings may be large or small, formal or informal, and need to be managed appropriately. A formal meeting about policy may be very different to a team meeting to develop shared understanding and commitment to a task. One-to-one meetings, e.g. supervision meetings, are different again, but still need to be properly managed to cover the necessary topics, meet each individual's needs and finish on time.

Some types of meetings:

- briefing meetings
- decision-making meetings
- planning meetings
- working groups
- consultation meetings
- review/evaluation
- team meetings
- team building meetings
- board meetings
- committee meetings

For any meeting:

- thorough preparation is vital
- follow agreed procedures, e.g. the quorum and the amount of notice required
- you need an agenda – whether formal, or just a note of topics to be covered
- ensure that practical details (venue, time, etc) have been arranged and communicated
- arrange for someone to take minutes or notes, and to write them up and distribute them
- take time before the meeting to think about the issues and any disagreements likely to arise, and how you will handle these
- start on time, keep an eye on the time throughout and finish on time
- maintain a level of 'control' appropriate to the kind of meeting (are you chairing a formal committee or encouraging and facilitating informal discussion?)
- ensure that the meeting focuses on the task(s) and make sure all agenda items are covered
- manage the group dynamics, e.g. ensuring that everyone has appropriate opportunities to contribute, that disagreements are not personalised, and that individuals treat each other with respect
- make sure that any agreed action, and the individuals responsible for them, are recorded
- summarise key points and decisions at the end of each agenda item and/or at the end of the meeting
- don't forget to arrange the next meeting, if there is to be one
- to improve your own meeting management skills, seek feedback from colleagues after the meeting.

Don't arrange a meeting just because there has always been a quarterly xyz meeting!

Effective written communications:

- be clear about your purpose:
  - are you writing to simply to inform, or trying to persuade the reader?
  - what does the reader already know, and what do they need to know?
- choose the most appropriate format – e.g. letter, memo, e-mail, report – taking the reader's expectations and preferences into account
- keep it as brief and simple as possible
- organise information and arguments in a logical structure
- use language appropriate to the reader
- and finally, check what you have written for clarity and impact:
  - will it achieve your purpose?
  - is anything unclear or ambiguous?

Report writing

The key to effective report writing is to get the message across as simply and clearly as you can. Nobody likes reading a rambling, unstructured report, and misspellings and grammatical errors irritate people. If it is worth writing, it is worth writing well!

Your own manager, or the recipient of the report, may have laid down guidelines, and the structure will also depend on the purpose of the report, e.g. whether it is to persuade or to inform. The following are general rules for effective report writing:

- keep it short – so that recipients actually read it!
- structure it in a simple, logical way
- if you are making recommendations, or require action, say that on the front page
- if there are cost implications, summarise these on the first page and append a budget
- where relevant, include an assessment of any risks associated with implementing your recommendations, and/or the risks of not taking action
- use plenty of bold headings and sub-headings – so people can find the bits they need to read
- use a large font and leave plenty of white paper around and between the text
- use diagrams whenever possible as an aid to clarity
- if there is lots of information, use appendices to keep the main text short
- ask someone to comment on your draft.

A typical report might be structured as follows:

Introduction	• why the report has been written
Summary	• a brief précis of the whole report, emphasising: • conclusions • recommendations • any action required • cost implications
Aims	• the purpose of the report • what it is about • what kind of action (if any) is needed
Main body	• the information you need to get across – the content and the structure will depend on the type of report it is, but it might include: • what you did, e.g. how you researched and analysed the material • the information you used • the sources you considered or reviewed • any risks you assessed, and how you did this
Conclusions	• a summary of valid conclusions which can be drawn from the main body
Recommendations	• proposals for action – make sure these are consistent with the conclusions!
Appendices	• any additional material which it is not appropriate to include in the main body, e.g. the full budget, research findings, etc

"I'M SORRY IT'S SUCH A LONG REPORT.
I DIDN'T HAVE TIME TO WRITE A SHORT ONE!"

Case study two

Communicating with others

During a one-to-one supervision meeting Veena gives Bob a new task which is part of a larger project she is managing. Bob is unsure of the overall aim and asks Veena to explain what the project is about and how it fits in with work he thinks another department may be doing.

Veena briefly outlines the project, saying that they will discuss it in more detail at the next team meeting - she is allocating this task now because she wants him to make a start. She hadn't heard about the other department's work, so asks Bob what he knows about it. Bob says it was just something Kabir, his 'counterpart' in the other department, said in passing – it hadn't seemed important at the time. Bob asks if he should meet Kabir to find out more, but Veena says there may be other links between the projects, and she will ask for a meeting with Tom, Kabir's manager. Bob can talk informally to Kabir, but it sounds as if she needs to discuss the whole thing at departmental level.

Veena and Tom meet and discover a number of areas of overlap. They decide to set up a joint project team, with sub-groups working on different aspects of the task.

Veena and Tom lead the first meeting of the joint project team. They share their information about the two projects with the team, and discuss how they can be combined to achieve all the desired outcomes. When the tasks are 'shared out', Bob ends up working with Kabir on a number of activities. Later Bob tells Veena that working with Kabir was very positive - they learned a lot from each other.

Decision-making

Effective decision-making is central to the manager's role. Using your knowledge, experience and judgement, you make decisions which impact on your work and the work of your team, and may also have a wider impact on the Society and its ability to achieve its objectives.

The most relevant British Red Cross management behaviours and competencies for 'Decision-making' are found under:

British Red Cross management behaviours

5 Take responsibility for your own decisions and actions and for your team
6 Demonstrate flexibility and open-mindedness
7 Support and share

British Red Cross management competencies

4 Analysis, decision-making and problem-solving
5 Innovative and creative thinking
6 Interpersonal and communication skills
11 Team-working

There are close links between 'Decision-making' and 'Managing within a changing external environment' page 34, 'Managing in a context of organisational change' page 35, 'Accountability and levels of authority' page 43, and 'Choosing the most appropriate management style' page 47.

Case study one

Decision-making

Martin has asked two members of his team to work together to come up with a way of tackling a problem which is delaying an important project. Unfortunately, they have come up with two completely different solutions and he now has to choose between them – and do it quickly!

He reads the two proposals again. Don has prepared a detailed proposal and budget and is clearly committed to his idea – and it seems to make sense – Martin thinks it would work. But it is costly and, perhaps more important, it will take time to implement.

Alex has just written Martin a brief note outlining her idea, and asked to see him. She says that she thinks Don is going way over the top – 'as always'. 'Quite ridiculous to throw all those resources at a simple problem!' She outlines the steps she thinks would solve the problem. Alex's idea sounds simple and although he isn't sure it will work quite as well, Martin decides to go with her plan.

Unfortunately, when they try to implement it, all kinds of things go wrong. After a couple of difficult weeks, and quite a lot of money, Martin realises that they will have to go back to square one, and use Don's proposal after all. His manager isn't happy!

Generating options:

Visioning – what new ideas are triggered by imagining an ideal future?
Modifying – what new ideas come from adapting or improving what we've already got?
Experimenting – what new ideas come from combining what we've already got in new ways
Exploring – what happens if we change our assumptions?

Decisions need to be well-judged and timely. You often need to take information from a wide variety of sources into account, and use it to make sense of a complex situation. You also need to think about the wider impact of the decisions you make.

What does this mean in practice? For major decisions, you may need to carry out research, sometimes including a detailed analysis of the external and internal environment.

If the decision is not immediately clear, you might want to generate a variety of options, and to use your team's creativity. It's easy to overlook possibilities and a team-working approach to decision-making or problem-solving is often helpful.

The options then need to be analysed and evaluated against your success criteria and any existing constraints (here you need a rigorous analytical approach, rather than creativity). Only then can you make a well-judged decision between them.

See 'Choosing the most appropriate management style', page 47.

Your management style is important in decision-making. It will sometimes be necessary for you to make a decision and just tell people what you have decided. In other situations, for example when you are seeking creative solutions or need other people's buy-in, you may wish to involve others.

A decision should be clear in resolving an issue and giving direction. Poor decision-making can undermine morale and generate a lack of confidence in your leadership, and you should also guard against decision-making by default, for example by putting off decisions for so long that that they are overtaken by events.

Case study two

Decision-making

Martin has asked two members of his team to work together to come up with a way of tackling a problem which is delaying an important project. Unfortunately, they have come up with two completely different solutions and he now has to choose between them – and do it quickly!

He reads the two proposals again. Don has written a detailed proposal and budget and is clearly committed to his idea – and it seems to make sense – Martin thinks it would work. But it is costly and, perhaps more important, it will take time to implement.

Alex has just written Martin a brief note outlining her idea, and asked to see him. She says that she thinks Don is going way over the top – 'as always'. 'Quite ridiculous to throw all those resources at a simple problem!' She outlines the steps she thinks would solve the problem.

Martin feels he can't make the decision on this basis, so he asks Alex to write up her proposal, and to cost it. When he has both proposals, he meets with his own manager to agree the criteria he should use to select the best option. The decision is now easy - Don's idea matches the criteria more closely. Martin calls a meeting to explain the criteria to Don and Alex, and Alex says she understands why her idea was not selected.

Don and Alex are both keen to use this approach themselves, so the next time an opportunity arises, the three of them work together to devise options and selection criteria and agree the best decision.

Business and work planning

Business planning involves turning the Society's strategic priorities and corporate objectives into the detailed initiatives and actions to be carried out by yourself and your team over an agreed time-scale. Individual work planning takes this a step further by identifying the actions to be carried out by each person, and provides the focus for managing their performance throughout the year. The detailed information on business and work planning was correct at the time of writing (2000) and whilst the principles still hold true some of the locations/job titles/processes and detailed activities may now be different. Please check the current business planning procedures.

The most relevant British Red Cross management behaviours and competencies for 'Business and work planning' are found under:

British Red Cross management behaviours

5 Take responsibility for your own decisions and actions and for your team
6 Demonstrate flexibility and open-mindedness
7 Support and share

British Red Cross management competencies

1 Leading people
2 Planning and managing projects and activities
3 Business, finance and resource management
4 Analysis, decision-making and problem-solving
6 Interpersonal and communication skills
9 Managing and developing individuals

Case study one

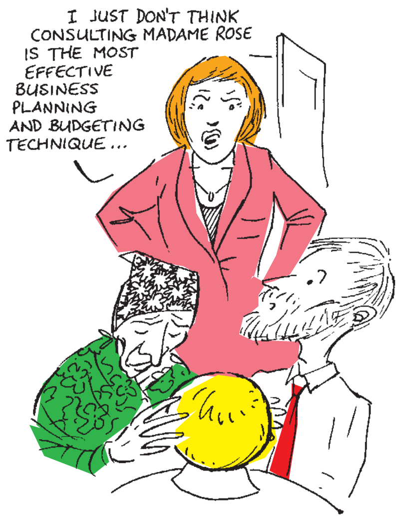
Business and work planning

Caroline doesn't involve her team much when she puts together her one year business plan. When the plan is approved, she knows that she should work with each member of staff to draw up their individual work plans. Being short of time, and knowing that her team are all pretty confident about their tasks, she asks them each to draft their own work plan, and give her a copy. She will check them when she has time.

She doesn't actually look at them until a couple of months later, when she is preparing for Jeff's supervision – their first since the plan was agreed. She is surprised to see that he has taken on a couple of tasks which she assumed Mel would do. She checks Mel's work plan and finds the same items listed there. She hopes they are working on it together, but when she meets with Jeff, he says they haven't discussed it. Jeff and Mel are working separately on the same tasks!

Caroline thinks she better have a proper look at all the work plans. It is pretty obvious that although what each person has listed makes sense from their point of view, the plans don't fit together – there are several duplications, and some items have 'fallen through the gaps'. And Mel is looking over-stretched. Caroline is also concerned to see that a couple of people have only recorded actions from the business plan – there's no mention of their other responsibilities, for example managing their teams. That will make it more difficult for her to supervise them.

Advice and Support from:
- **your line manager**
- **your Divisional Operating Plan Manager** (DOPM), who co-ordinates the planning process within a Division and supports the Divisional Director in producing a robust Divisional Operating Plan
- **or your Regional Operating Plan Manager** (ROPM), who co-ordinates the planning process within a Region and supports the Regional Director in producing a robust operating plan
- **your Business Analyst or Divisional Accountant**
- **Strategy and Planning Division at UK Office**



The Society produces three-year business plans and one-year operating plans. You may produce a plan for your team, or contribute to the plan for a larger unit. The plans are developed from the strategic priorities and corporate objectives which are set by the Board and Senior Management Team, and each Territory or UK Office devises objectives and measures to support these. Your plan needs to demonstrate how your team's activities contribute towards the corporate priorities and the objectives agreed by your Territory or Division. The three-year plan lays out the Society's longer term strategy, and helps to ensure continuity from one year to the next. It is reviewed on an annual basis. The one-year plan is more detailed, identifying the team's initiatives, actions and budgets, and the measures against which progress on each action will be monitored.

Strategy and Planning Division at UK Office produces detailed business planning guidance, which explains the Society's strategic priorities and objectives, and highlights issues managers need to take into account. If you follow this guidance and ensure that your planned activities support the strategy, devising or contributing towards a business plan should not be daunting.

Since your team will be responsible for carrying out or contributing towards actions in the operating plan, you should involve them in the planning process. You also need to make sure that they feel their targets are realistic and understand how their actions fit into the work of the team and contribute towards the Society's strategic priorities and initiatives.

The business planning guidance also provides help with financial planning, indicating how you should compile the budget for the actions identified in your business plan. This is a relatively simple process if you follow the guidance provided.

Do you need help with budgeting and financial planning?
- Seek advice from your line manager, Business Analyst or Divisional Accountant
- Consider attending a training course (details from Territory Training and Development specialists, or the Staff Development Team at UK Office)

Bear in mind that the actions in your business plan may impact on the plans and budgets of other teams or departments. For example, if your plan involves producing a series of information leaflets and the budget for publications is held elsewhere, you will need to discuss this with the relevant department and ensure that the costs are covered. Similarly, if you realise that you will need to access significant amounts from the training and development budget held by the Territory or by the Staff Development Team at UK Office quarters, you should discuss this with them.

Monitoring the business plan

Areas, Territories and UK Office Divisions submit **quarterly monitoring reports** on progress on the operating plan. You will need to compile a monitoring report on your team's activities, and pass it to your manager. The easiest way to assemble this information is to collate it during one-to-one supervision meetings with your staff. Area Directors and Heads of Department produce summary reports of progress on key actions and initiatives, and Divisional and UK Directors further summarise these into a Management Highlight Report which is submitted to the Strategy and Planning Division for discussion at Senior Management Team meetings. Business plan monitoring should be seen as a cyclical process in which:

- information is collected, analysed and passed up the management line
- feedback is received from senior management
- plans are reviewed and adjusted to ensure that they remain current and valid.

Creating individual work plans for your team

Individual work plans are an essential tool for managing the performance of your team.

Towards the end of the year when the operating plan is nearing final approval, you need to work with your team to create their individual work plans, dedicating a supervision meeting with each person to the task.

For guidance on one-to-one supervision, see page 95.

The Staff and Management Development Team produces detailed guidance on how you should create these work plans. A form for individual work plans is provided in Appendix 4, together with an example of a completed form. If you and your team find it more helpful, you can record the same information in a different format.

See 'The individual work plan – good practice guidance for managers'. The Staff and Management Development Team at UK Office can provide advice and short training sessions on creating work plans.

Although you are responsible for creating these work plans for your team, you can ask the more experienced members of your team to draft their own individual work plans, and thus save yourself a considerable amount of time. Using this approach will also help your team to understand how their tasks contribute to team and corporate objectives. You must, of course, still take the time to discuss each draft work plan with the individual, and approve the final version.

The work plans for your team clarify each individual's responsibilities for actions identified in your business plan. This ensures that each person is clear about their tasks, objectives and deadlines, and the associated measures, and makes your task in monitoring progress on the plan very much easier.

The work plan also summarises and provides targets and measures for all the individual's other tasks and activities for the year. It summarises:

- key actions taken from the business plan
- other activities, including ongoing activities outlined in the job description
- for managers only: activities relating to managing and developing your staff.

If the individual takes on any new tasks or activities during the year, these are added to the work plan when it is reviewed in supervision.

By summarising each individual's activities and targets on a single form, you have created a very simple tool for managing that person's performance over the year. The work plan provides the focus for your supervision meetings with your team, and you should also use it in appraisals. In both supervision and appraisal you should refer to the work plan to review progress and performance and to discuss objectives for the future. The individual's work plan is also the focus for discussions about training and development.

See page 120 for guidance on training and development plans.

Having identified all the individual's tasks and activities for the coming year, it is relatively easy to identify any training and development needs relating to these tasks, and draw up their training and development plan with them.

Having created individual work plans with each member of your team, these need to be reviewed at regular intervals throughout the year. Priorities change and new activities may need to be incorporated into an individual's work plan, with other items being deleted to allow time and resources for the new priorities. Focusing discussions about changing priorities on the individual work plan will help ensure that activities are only deleted by an active decision, rather than by default.

Case study two

Business and work planning

Caroline makes sure all her team contribute their ideas when she puts together the one-year operating plan for her team. As soon as the plan is approved, she arranges a one-to-one supervision meeting with each of her staff to draw up their individual work plans.

When she meets with Jeff, she finds that there has been a misunderstanding about some activities. Jeff assumed he would carry out certain tasks, which she had 'earmarked' for Mel. She decides she needs to discuss this with Mel, so she completes the rest of Jeff's work plan with him, saying that she will come back to him after her supervision with Mel.

When she and Mel put together Mel's work plan, it seems that Mel is likely to be over-stretched – particularly as she has to spend more time than the others on managing her team. Mel and Caroline agree it would be best if Jeff completes the tasks in question.

Having told Jeff and revised his work plan, Caroline meets with each of the others in her team, and draws up their work plans. It has all worked out well, and the plans will be an excellent foundation for supervision throughout the year.

Managing and contributing towards projects

The term project covers a wide range of activities, from relatively short and simple tasks carried out by one, two or three people, to major pieces of work involving a number of activities and a team of people (often from different departments and units and sometimes different sites). Some projects may involve implementing changes that have the potential to impact on the whole organisation or particular parts of it.

Project management is the planning and co-ordination of a number of activities that need to be carried out in order to achieve the project objectives.

The most relevant British Red Cross management behaviours and competencies for 'Managing and contributing towards projects' are found under:

British Red Cross management behaviours

4 Recognise and value the contribution of others
5 Take responsibility for your own decisions and actions and for your team
6 Demonstrate flexibility and open-mindedness
7 Support and share

British Red Cross management competencies

2 Planning and managing projects and activities
3 Business, finance and resource management
4 Analysis, decision-making and problem-solving
5 Innovative and creative thinking
6 Interpersonal and communication skills
11 Team-working

Case study one

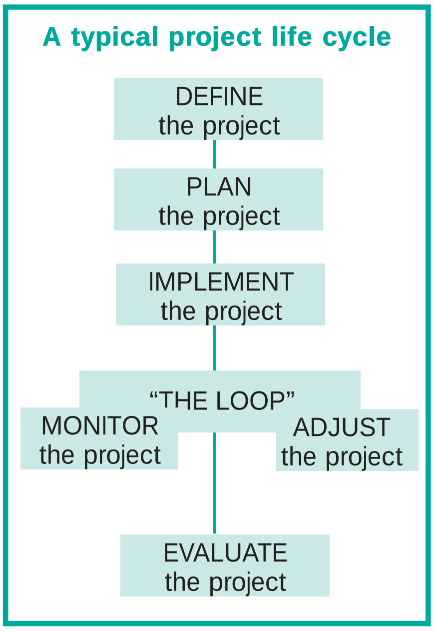
Managing and contributing towards projects

Keiko, Ann's manager, asks her to take on the management of an urgent new project, using the staff in her team. As the two month deadline will be tight, she authorises her to call on a couple of people from another Unit, 'but only if she needs to'.

Ann is confident that she knows what is wanted and feels her team can cope, so she plans the project and allocates tasks and responsibilities to them. They all seem pretty confident, apart from James, who isn't sure he'll have time, and thinks he might need some help. As Ann is busy, she suggests James asks other members of the team if he is stuck.

At the first progress meeting, she finds that none of the team felt really confident about exactly what was wanted, and they tell her that they haven't had time to do much anyway. Ann decides to bring in the 'outside help' Keiko suggested. She tells her team which tasks she is passing on to the others, and then arranges to meet with these colleagues, only to find that they are not available for two weeks. Ann decides she will have to do some tasks herself. A week before the deadline, there still hasn't been enough progress.

Ann takes on the task of bringing together what they have produced so far and drafting the report, and warns Keiko that the project will be late. Keiko asks to see what has been done, and discovers that it 'isn't really quite what she wanted'. Ann reacts angrily, and they end up each blaming the other for what turns out to be quite a major misunderstanding.



Managing projects

There are many different approaches to project planning and management, typically involving a number of separate steps, combined with a process of regular monitoring and review, so that plans can be adjusted. Whichever approach you choose, you must ensure that you have well-structured processes for:

- defining the project and establishing the aims and objectives
- planning what needs to be done
- implementation including regular, ongoing review and adjustment
- evaluation.

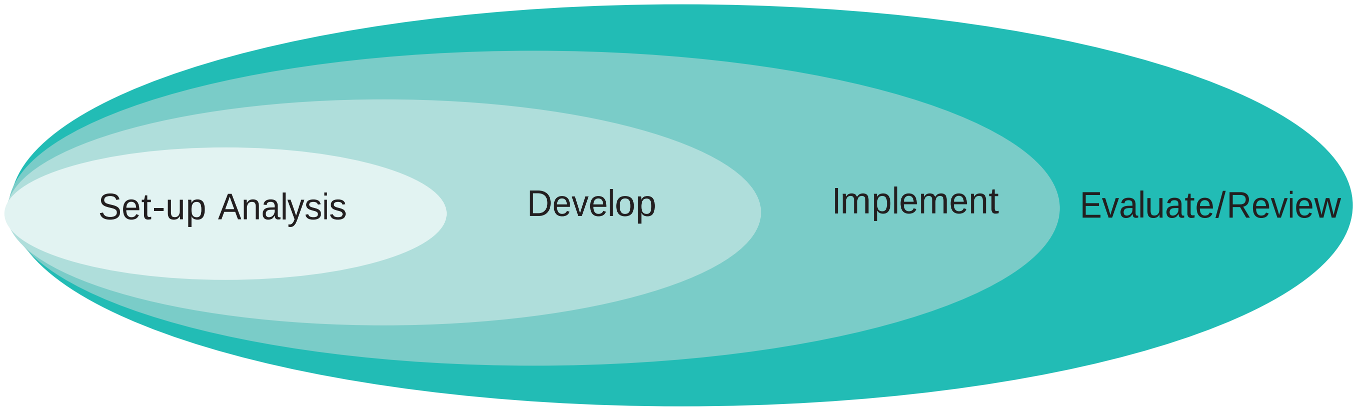
The project management approach (opposite) describes four phases, and will help to ensure that the various activities are delivered in a structured, manageable and controlled manner.

Project phase chart	Phase description
1. Set-up and analysis	• Establish the project aims and objectives • Define the scope and prepare the 'first cut' requirements • Plan and budget the project • Validate the project (i.e. ensure and demonstrate that it will achieve the agreed objectives) • Gain management sponsorship and authority to proceed
2. Development	• Organise the project team and resources • Complete agreed work to progress the project activities in preparation for going live • Update the plan and budget • Gain agreement to proceed
3. Implementation	• Manage the project events, activities and communications described in the project plan • Manage issues and changes that arise • Complete project activities
4. Evaluation and review	• Identify if the project met its objectives • Review lessons learned while undertaking the project • Determine scope for any further related work

The above table presents the project approach as a series of discrete phases. In practice, project management should always be an iterative or cyclical process, in which you review progress against the objectives and review the objectives themselves at regular intervals, and adjust the plan accordingly.

In the above description, each of the four phases actually involves reviewing and refining the previous steps, with more detail being added to the work as you enter the next phase. With the work becoming progressively more detailed, you need to ensure that each step is right and has been approved by the project sponsor(s) and relevant managers, before moving on. Mistakes become progressively more costly to correct (in both time and money) as the project develops, so it is important to review and adjust your plans as necessary.

The iterative nature of the above project management approach can be illustrated as follows:



Setting **'SMARTER'** objectives:

Specific
Measurable
Achievable
Realistic
Time-related
Enhancing the service
Recognising progress

The constraints on your objectives may include:

Budget constraints
Time constraints
Performance constraints

If you have been given a project to manage, your first task is to establish exactly what is wanted. What are the aims and objectives? When does it have to be done by? What will the end product look like? And how will you know if you have succeeded?

It may be difficult to obtain complete clarity – the project sponsors may not have a clear picture themselves, or you may have several sponsors with different ideas. For any major project, you may also need to go back at regular intervals to check that you are on the right track.

You will need to create a project team, and should involve the team in planning the project at the earliest possible stage. You are not the only person with ideas, and some of theirs might be better than yours! While you retain responsibility for the team's decisions and the work they do, no one ever lost the respect of a team by consulting with them and taking on good ideas! By involving your team, you will also build a shared commitment to the task.

The most effective objectives will be created by a combination of:

- the project sponsor
- the end-user
- the project manager
- the project team
- the budget holder or financial controller
- any relevant suppliers

Are there different ways of completing the project? You may have to generate a variety of options and then choose between them, or you may have little freedom to choose. If you are responsible for making such choices, your objectives and your end product (what success looks like) will help you decide the criteria on which you base your choices. When you have made your decision, you may need to check back with the project sponsor(s) again, although this will depend on the authority you have been given.

Plan with the project team, choosing a planning method appropriate to the task. The four-phase project management approach described on page … may be useful, or you might prefer the 'Methodical Approach' which is widely used by British Red Cross managers, either to plan and manage a complete project, or to refine the process for a component of a complex project which requires detailed analysis.

Keep the plan simple, breaking the project down into achievable tasks and allocating them appropriately amongst the team. Make sure that you have clear timescales for each task, and that each person knows exactly what is expected of them and how much 'freedom' they have to plan for themselves or to modify existing plans.

If you manage major change projects, you will inevitably need to use more sophisticated methods to plan, manage, monitor and review them.

Do you have the planning 'tools' and other skills you need to plan and manage the projects you work on?

If not, you should discuss your training and development needs with your manager.

You also need to consider your resources, including people's time, and financial and physical resources. Are they realistic? Can you go back for more? Or will you need to modify your objectives? Do you need to go back to the sponsor(s) and talk it through?

Once the project is underway, you need to monitor and review progress and the quality of work. Few projects run completely to plan, but if you review regularly, revise plans when you need to and keep in touch with the sponsor(s), the project should be completed successfully, on time and within budget.

Finally, you should review the whole project with the team when it has been completed. What went well, and what can we learn from our successes? What didn't go so well, and what can we learn from this? You should give members of the team constructive feedback on their performance, and ensure that they receive credit for their contribution. Their line managers should know what they have achieved, and what they have learned.

The **'Methodical Approach'** is another useful project planning and management tool. It is widely used in British Red Cross to plan and manage tasks and projects or separate components of a complex project. Its six stages consist of:

- **Aims:**
  - Purpose
  - End product
  - Success criteria
- **Information:**
  - Known
  - Unknown
- **What has to be done:** in light of the aims and information, what needs to be done to complete the job?
- **Plan:** who does what, when, where and how, for each activity identified above
- **Action:** carry out the plan
- **Review:** check whether aims achieved – if not recycle to information stage

Contributing towards projects managed by other people

As a member of a project team, you need to ensure that you have clarity about your tasks. If you feel unsure about the objectives or success criteria, or what is expected from you, you should go back to the project manager for clarification. You also have a responsibility to complete any tasks you have taken on, meet deadlines, and seek help in good time if you are having problems.

Your team-working skills are also important. What can you contribute? Have you identified issues which the project manager has not recognised? What constructive feedback can you give to the manager and the team? Finally, make sure you learn from the team's successes and from things which did not go so well. Being involved in a project team is always an opportunity for learning!

Case study two

Managing and contributing towards projects

Keiko, Ann's manager, asks her to take on the management of an urgent new project, using the staff in her team. As the two month deadline will be tight, she authorises her to call on a couple of people from another Unit, 'but only if she needs to'.

Ann isn't confident that she knows what is wanted, and requests another meeting to clarify the objectives, success criteria, budget and resources available to her, and her level of authority, so she knows when to refer back to Keiko. She decides that she will need to involve two people from the other Unit. She calls a meeting of her own staff and the two others, explains the task to them, and invites their ideas about how to complete the project. The group then matches these to the success criteria and chooses the best option.

Ann confirms the team's preferred option with Keiko. She then draws up a project plan and budget, presents these to the team and arranges a schedule of meetings to discuss progress. She has a separate meeting with James, who expressed concerns about his tasks.

Ann reviews progress at team meetings. At one point, it becomes clear that certain tasks need to be reallocated so that they do not hold up progress. There are still a few outstanding tasks one week before the deadline, but Ann finds that by juggling her priorities, and those of one of her staff, they can complete the project on time.

When the project has been completed, Ann facilitates a review with the team. Each person feeds back their perceptions of what went well, and what did not, and suggests what they can learn from this. Ann gives constructive feedback to the team, and praises them for their good work. Keiko praises Ann and the whole team for the way they have pulled together to complete the project on time.

Recruiting to your team

When recruiting to your team, you should first make sure that the design of the job and the job description accurately reflect the Society's and your requirements. The person specification must accurately reflect the knowledge, skills and qualities required, and the whole recruitment and selection process must be carried out in a way that will ensure that the 'best person for the job' is selected.

The most relevant British Red Cross management behaviours and competencies for 'Recruiting to your team' are found under:

British Red Cross management behaviours

1 Uphold the Fundamental Principles and act with integrity and in accordance with the Society's values and obligations
2 Recognise the implications of working within a charity and a voluntary organisation
3 Ensure equal opportunities and anti-discriminatory practice and promote diversity

British Red Cross management competencies

4 Analysis, decision-making and problem-solving
6 Interpersonal and communication skills
8 Recruiting and selecting individuals

Case study one

Recruiting to your team

Ray is delighted with the response to the press advertisement for a new person to join his team. Having short-listed the applicants, he asks Human Resources to arrange for him to interview four candidates with Greg, his assistant.

On the morning of the interviews, he asks Greg to help him draft the questions. Greg, who had not seen the job description and person specification before, is concerned when he reads them, suggesting to Ray that it might be difficult to ask questions to match some of the criteria, which look rather vague and don't seem linked to the job description. Ray is unconcerned - he has loads of interviewing experience, and will know the right person when he sees them.

In the event, Ray drafts most of the questions, and although they all seem very general, Greg, who has no interviewing experience, decides not to say any more.

When the interviews take place, Greg asks all the questions Ray gave him, but is surprised that Ray's questions are sometimes different to the ones they agreed, and that he takes very few notes. One of the candidates is asked very little, although Greg thinks she is quite good.

After the interviews, Ray says, 'That's easy, isn't it? It has to be Jane. Good skills, and she'll fit in very well. I always think that is most important, don't you?' Greg is doubtful. He agrees that Jane would fit in well, but he isn't sure that her experience is all that relevant and she doesn't seem to have all the knowledge and skills Ray specified. He says he thought one of the others was a closer match. Ray says he doesn't think he could work with him, he is 'too pushy', while Jane is 'obviously willing to learn, and we can easily train her up'. 'I know what I am doing, Greg' he said. Greg decides not to argue.

Creating a new job (or reviewing an existing one):

Stage 1: Job design – a detailed analysis of the requirements of the post

Stage 2: Job description – describing what the job entails – the tasks, responsibilities and accountabilities

Stage 3: Person specification – a description of the knowledge, skills and personal qualities required to do the job

Key questions:

- how will the new job contribute towards the Society's objectives?
- are the responsibilities and accountabilities clearly defined?
- are the relationships with other posts and any partners clear and workable?
- is the job do-able?
- will it be rewarding – does it include personal responsibility for work done?
- will it attract a person with the knowledge, skills and qualities required?

Job design

New posts must be agreed at senior level, and will only be approved if you have made out a strong business case.

Designing any job requires a detailed analysis of the Society's requirements of the post, but you also need to match the Society's objectives with the need to create a job that will attract a person with the knowledge, skills and qualities you need, and is 'do-able' and rewarding for the post-holder. Only when you are satisfied with the overall design, can you turn it into a job description.

When recruiting to an existing post, you should use the opportunity to review all aspects of the job against the Society's current priorities and business plans, consulting with your line manager, anyone with functional responsibilities or specialist knowledge relating to the post, and human resources specialists, as required. Bear in mind that if you change the tasks and responsibilities, this may affect the grade and salary.

Certain 'core' positions e.g. Area Director, have standard job descriptions. These cannot be changed without detailed discussion with your line manager and human resources specialists. Such changes have to be approved at a senior level.

Writing the job description

The Society's recruitment and selection pack provides detailed guidance on relevant policies and procedures and all aspects of the task. Specialist advice and support is available from the UK Office or Territory Specialists.

If you are writing a new job description, or revising an existing one, you need to ensure that it is a realistic interpretation of the main responsibilities of the post. You should also bear in mind that prospective candidates will base their decision about whether to apply on the job description. Does it sound interesting and rewarding enough for a suitably qualified and experienced person inside or outside the organisation to say: 'I have a good idea of what this job is about, and I'd like to apply'?

Job descriptions should be written using the standard format and not be too detailed. If the job description focuses on general responsibilities, it will remain accurate and relevant as objectives change over the years. Specific objectives and activities belong in the business plan and the individual work plan, rather than in the job description.

The job description should be discussed during induction to confirm the expectations of the post with the new appointee, and then reviewed once a year, at appraisal, to ensure that it still accurately describes the duties and responsibilities.

Writing the person specification

Refer to the Society's recruitment and selection policies and procedures, and the equal opportunities policy.

From this stage, the whole of the recruitment and selection process is based on the person specification, which defines the knowledge, skills and qualities required to carry out the job and states any special circumstances or practical requirements. It should be based directly on the job description, and you should be able to justify each of the requirements on ability to carry out the job. This means that you need to think each requirement through, and state it very precisely. What exactly does the job need? Is this requirement really essential? If I include it, am I excluding people who could do the job? If you get this wrong (and it is easy to do so, even with the best of intentions!) you may be introducing a bias and undermining the objectives of the Society's equal opportunities policy. You may also be excluding the best candidate for the post! Do consult the recruitment and selection pack and/or seek advice from your line manager or a human resources specialist if you are not sure.

If you have written the job description and person specification for a new post, or amended them for an existing position, you will need to refer them to the human resources team who will evaluate the job for grade and salary.

Advertising the post

How you advertise the post, e.g. the wording of the advertisement and where it is placed, will affect the applications you receive. Seek advice from your Human Resources Manager, who will use a recruiting company to place the advertisement, and obtain their specialist advice on the best publications to use to attract suitably qualified and experienced applicants from all groups in the community. Don't forget to include the equal opportunities 'strap-line'.

What, exactly, does the job require?

- How numerate (for example) does the person need to be?
- What do you mean by 'good communication skills'?
- Do they need to be able to drive? Or simply to be able to get themselves around the county?

Key messages:

- follow British Red Cross policies and procedures, including the equal opportunities policy
- involve a Human Resources specialist and/or seek their guidance as required
- ensure that you do not discriminate on matters unrelated to the person specification and the ability to do the job
- undertake training (the Recruitment and Selection, and Managing Diversity Courses) if you are new to recruitment and selection, or to ensure that you are up-to-date on legal requirements and British Red Cross policies and procedures
- value diversity
- respect the views of others on the panel, and seek the views of the most junior members first (so that they are not unduly influenced by the others)

Selecting the right person for the post

Your aim is to select the person who best meets the requirements of the post. The process you use will always include short-listing and interview, but you should consider using additional methods, e.g. a practical test of skills or an assessment day.

Whatever methods you use, you must ensure that all your criteria are directly based on the job description and person specification and that other factors do not influence your decision.

Even if you have received training elsewhere and have experience of recruitment and selection, you should complete the **British Red Cross Recruitment and Selection Course** to ensure that your knowledge, including legal knowledge, is up-to-date, and that you are following the Society's policy and procedures.

The **'Managing Diversity'** course will bring you up-to-date on equal opportunity policy issues.

Who should be involved in making the decision? You, as manager, are responsible for the recruitment decision, but you should not make it on your own. Involving others, e.g. a human resources specialist, will help ensure that the process is in keeping with British Red Cross policies and procedures. Those with a functional management responsibility, or with specialist knowledge relevant to the post should also be involved. It is good practice to ensure that the short-listing and interview panel is balanced, as far as possible, with a mix of race and genders. Think about the possible implications of a male candidate being interviewed by an all-female panel (or vice versa), or a black candidate interviewed by an all-white panel – would it make a decision difficult to justify or give cause for complaint?

Short-listing should be carried out independently by everyone on the panel, with each person scoring against the criteria and the panel then meeting to agree who will be interviewed. For the interview, you should follow the Society's procedures for agreeing and asking questions, recording answers, and making and recording the decision. It is important to recognise how difficult it can be to avoid personal bias from 'creeping in' and affecting your scores. All kinds of things – accent or clothes (or a little habit which reminds you of your mother!) – can influence your view. You must ignore anything unrelated to the ability to do the job.

Case study two

Recruiting to your team

Ray was delighted with the response to the press advertisement for a new person to join his team. The Human Resources team send out the application forms and information packs and get a good response. Ray wants Greg, his assistant, to interview with him, but that would mean two men, so he asks Gwen, the Human Resources Manager, to short-list and interview with them. They each short-list the applicants, and came up with four candidates, who are invited for interview. Ray and Greg draft questions to address each of the criteria in the person specification, and then make a couple of changes on Gwen's advice. Ray prepares interview forms, where they will each note and score the candidates' replies.

The interviews run smoothly. Each candidate is asked the same questions, and the three members of the interview panel make separate notes of their replies.

After the interviews, each person scores the replies separately. Greg, who hasn't interviewed before, asks their views about one candidate's reply to a question, but Ray says that he doesn't want to influence Greg's scores – they will discuss it when they have finished. As the most junior member of the panel, Ray asks Greg for his views first. Gwen's views are similar, although she has scored the candidates a bit differently, and Ray's scores are somewhat different again. However, when they add up the scores, one of the candidates emerges as scoring significantly higher than the others. After some discussion, they agree that the highest scoring candidate meets the criteria best, and he is appointed. As they leave the room, Ray comments that it will be interesting to see how it works out. The chosen candidate has a different background to others in the team. 'But I'm sure he is the right person', he says, 'and the team will benefit from a new approach.' Greg agrees.

Managing the performance of individuals and teams

Many of the tasks and activities for which you are responsible will be carried out by the people you manage, rather than by you personally. This means that managing the performance of your team must be a top priority.

The most relevant British Red Cross management behaviours and competencies for 'Managing the performance of individuals and teams' are found under:

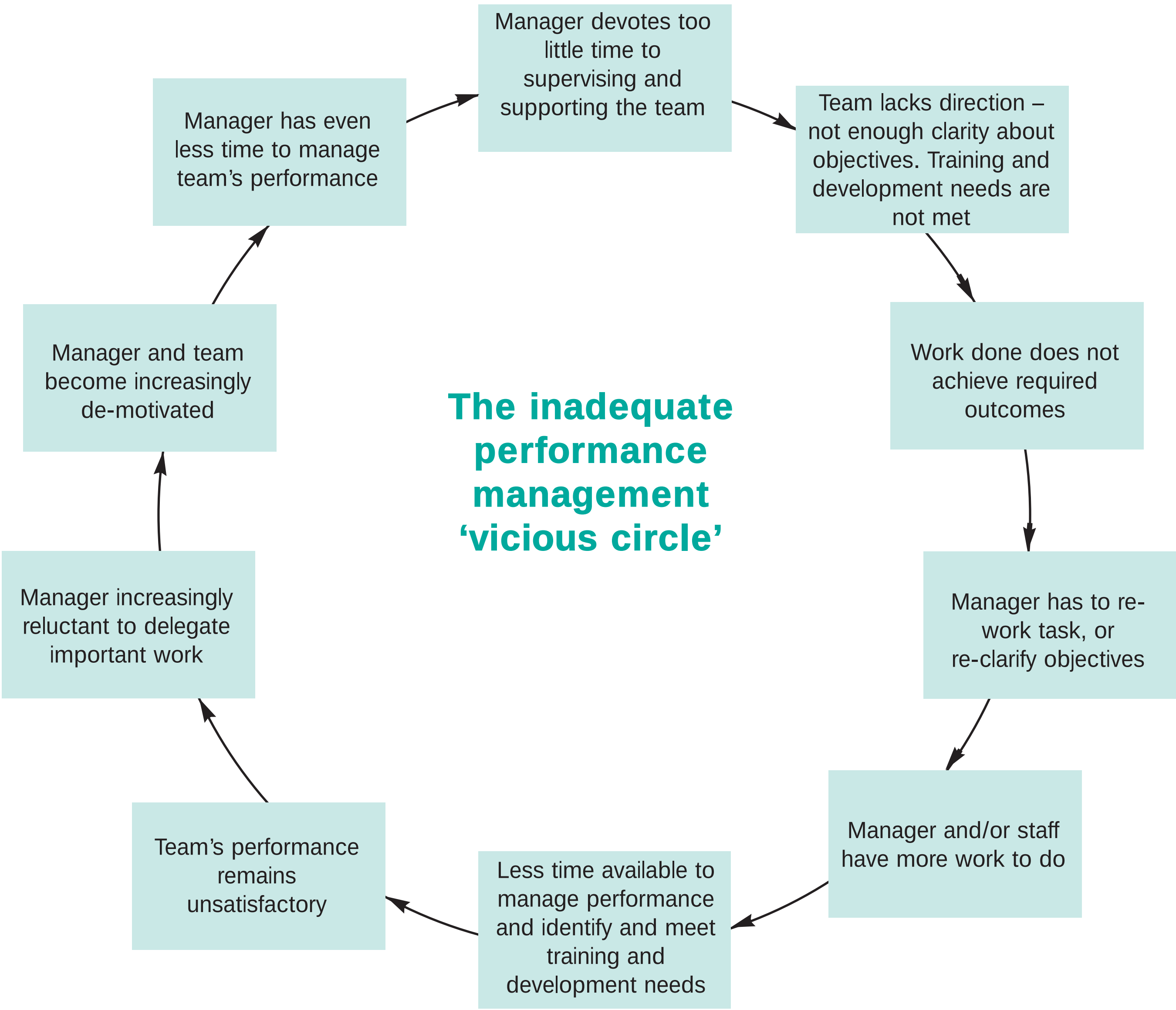
British Red Cross management behaviours

2	Recognise the implications of working within a charity and a voluntary organisation
3	Ensure equal opportunities and anti-discriminatory practice and promote diversity
4	Recognise and value the contribution of others
5	Take responsibility for your own decisions and actions and for your team
6	Demonstrate flexibility and open-mindedness
7	Support and share

British Red Cross management competencies

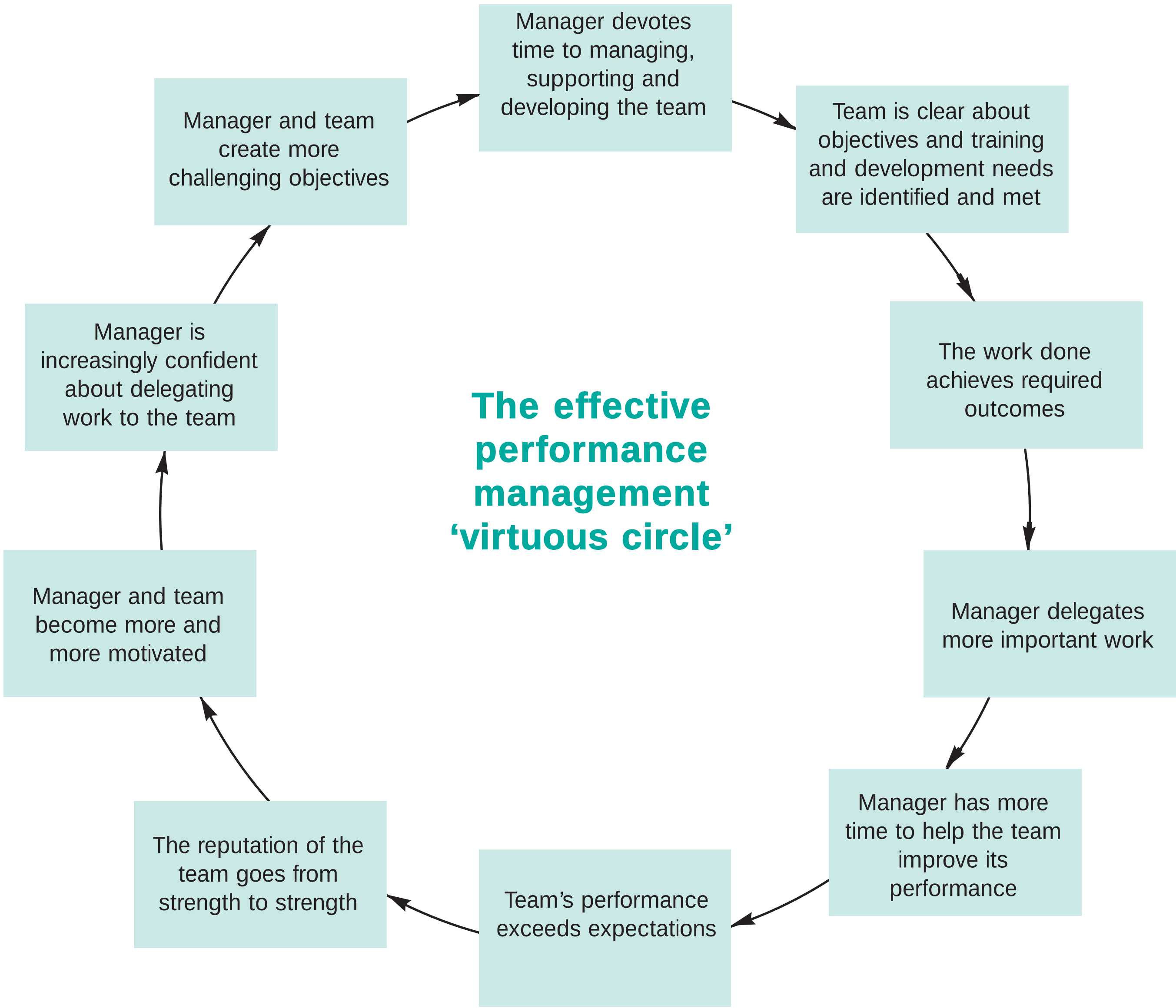
1	Leading people
2	Planning and managing projects and activities
6	Interpersonal and communication skills
8	Recruiting and selecting individuals
9	Managing and developing individuals
10	Responsibility for the well-being of others
11	Team-working

Unfortunately, with all the other tasks they have to do, some managers may not give managing people the priority it deserves. This can result in something of a vicious circle, as illustrated opposite. The team cannot be effective if they do not fully understand the outcomes required, and individuals may need additional support and encouragement to achieve the required objectives, or have specific training and development needs. If you do not make time to manage and develop your team, their performance and their motivation will suffer. The situation develops into a vicious circle because you start to feel that you cannot delegate important tasks to them, and so have even less time available to manage, support and develop your team.



You can prevent this situation developing, or address problems if they arise, by making time to manage, support and develop your team. In the short term, particularly if you manage a large team, this will inevitably increase your workload, and you may need to postpone some of your own tasks to achieve this. However, the longer term benefits are considerable. Your team's performance and their motivation will improve. They will be able and willing to take on new tasks and new challenges, and will welcome the development opportunities this brings.

Effective performance management can turn a team's performance round very quickly and as their performance improves, you will find that you can delegate more work to them, and your own workload becomes more manageable. You may even find that you are able to take on new challenges yourself, and to undertake the development you need to complete these new tasks. This is illustrated in the 'virtuous circle' overleaf.



The key activities you must undertake to manage the performance of individuals in your team are:

- individual work planning (covered in business and work planning, page 72)
- recruitment and selection (see page 83)
- induction (see page 91)
- one-to-one supervision (see page 95)
- appraisal (see page 99)
- identifying training and development needs and ensuring they are met (see page 119)

An overview of these key management activities is provided in the description of the management framework, page 6, which covers these in relation to you as a manager, and your line manager's management of your performance. The following section provides guidance on carrying out induction, supervision and appraisal in your management of the individuals in your team.

Induction

The way you induct a new member of staff into your team will impact on that individual's performance throughout their employment with the Society.

The most relevant British Red Cross management behaviours and competencies for 'Induction' are the same as for 'Managing the performance of individuals and teams', as follows:

British Red Cross management behaviours

2 Recognise the implications of working within a charity and a voluntary organisation
3 Ensure equal opportunities and anti-discriminatory practice and promote diversity
4 Recognise and value the contribution of others
5 Take responsibility for your own decisions and actions and for your team
6 Demonstrate flexibility and open-mindedness
7 Support and share

British Red Cross management competencies

1 Leading people
2 Planning and managing projects and activities
6 Interpersonal and communication skills
8 Recruiting and selecting individuals
9 Managing and developing individuals
10 Responsibility for the well-being of others
11 Team-working

Case study one

Induction

Tony takes up his new position four months after his predecessor left the Society and there is a considerable backlog of work. Sally, his manager, feels confident that he has the technical knowledge and skills he needs, and her priority is to ensure that the team can catch up as quickly as possible. On Tony's first day, she has a brief chat with him and walks him round the department to meet the team. Then she gives him a couple of simple tasks to get on with. Explaining that she has to spend most of the day in meetings, she tells him to ask the others if he has any problems, and dashes off.

Over the next few weeks, Sally has little time to spend with Tony, so she asks a couple of experienced members of the team to pass work on to him, and generally keep an eye on him. When the next 'Red Cross World' induction course comes up, one of the team suggests Tony should attend, but they are all so behind on the work that Sally decides this must wait.

The end of Tony's probation period comes and goes. Having spoken briefly to Tony and some of the team, Sally thinks he is doing OK and confirms the appointment. Some months later, two other members of the team ask to see Sally. It transpires that although Tony has good skills, his work suffers because he doesn't understand how the Society or the department works, and he isn't talking to the other teams his work relates to. They have tried to encourage him to 'get more involved' but he is reluctant to contact people. Sally comments that his work doesn't reflect this, but they say this is because they have been checking and re-doing a lot of it. The team was happy to help him settle in – after all he is a nice person, and has all the qualifications – but they have their own work, and are starting to feel resentful. They say that Tony himself seems de-motivated.

With a thorough and effective induction programme for new staff, you can:

- build commitment to the Society, its Fundamental Principles and values, and its vision, mission and strategic priorities
- make sure that the new starter understands the Society's and your expectations of employees, and relevant policies and procedures
- introduce the individual to the Society's 'culture' and 'ways of working'
- develop understanding of the work of the team, and how it contributes to the Society's objectives
- develop understanding of how the new starter's own work contributes to this, and build motivation and commitment to the task
- explore the competencies (skills, knowledge, understanding, qualities and attributes) the new starter needs to perform effectively in their role, analyse their existing performance and capability against these, identify any immediate or short-term training and development needs and draw up a training and development plan to meet them
- introduce the new starter to people they will be working with, and set the foundations for effective communication within and outside the immediate team.

For more information about induction, refer to the Red Cross World induction booklets, which provide resources and guidance for managers and new staff.

For guidance on drawing up a training and development plan, see 'Developing your team', page 120.

The British Red Cross induction programme, which lasts about three months, is a systematic programme designed to induct a new starter as quickly as possible without causing information overload. The programme incorporates various taught courses:

- **Red Cross World** (attended by all new starters)
- **Standard Ideals in Action** (highly recommended for all new starters)
- **Health and Safety** (highly recommended for all new starters)
- **Promoting or Managing Diversity** (highly recommended for all new starters)

followed by any job-specific training and development identified to enable the individual to carry out their tasks and activities.

The taught courses are an important part of induction, but the induction you provide in the workplace is even more crucial – this is where the new starter learns what the job involves, what your requirements are, and how to perform effectively in the role. Do use the induction booklets the Society provides to plan and facilitate the induction process, tailoring the various activities to meet your and the new member of staff's needs, and encouraging the new starter to take an active part in planning and managing their own induction.

The Society's induction booklets:

- **'Finding your way'** – which provides detailed guidance for managers who are responsible for inducting a new member of staff
- **'Ready, steady, go'** – a workbook for the manager to use in planning the programme
- **'Taking responsibility'** – for the new starter to plan and record details of their own induction

(A separate booklet **'Inducting new volunteers'** covers the equivalent processes for volunteers.)

If you are inducting a new manager into their role, and perhaps also into the Society, you will also need to introduce them to the management framework and the associated management activities, and to the British Red Cross management behaviours and competencies. This good practice guide for managers will provide a useful introduction, which you can then build on with discussion and support. Since the management behaviours and competencies define the Society's expectations of managers, you will need to make sure that the new manager understands their implications, and spend some time identifying any training and development they will need to meet these expectations.

The Society's induction programme is aimed at staff who are new to the Society, but relevant sections should also be used with existing British Red Cross staff who move into a new post.

Case study two

Induction

Tony takes up his new position four months after his predecessor left the Society and there is a considerable backlog of work. Sally, his manager, knows she will be busy over the next few months so she asks Pat, the most experienced member of her team, to act as Tony's mentor during his induction and coach him on the Society's procedures, etc. Sally has cleared her diary on Tony's first morning, and after discussing the Society and his role, they go through the induction booklets together. Sally encourages Tony to use his booklet to map out and record his progress. She explains that Pat will be his mentor and coach, and takes him to meet her. She and Pat have planned some of the activities he will undertake during his induction, and they talk this through with Tony. He is already booked onto the next 'Red Cross World' induction course, and Sally tells him they will use part of his first supervision meeting to discuss any training and development he needs for his tasks.

Pat has arranged for Tony to meet members of the team after lunch. After that, Pat explains how Tony's work relates to other departments and teams, and outlines the meetings she has arranged with relevant people. Finally, she explains the tasks Tony will work on in the first week or so and, having checked that he knows what he is doing, leaves him until half an hour before the end of the day, when they get together to see how it is going.

Sally has booked one-to-one supervision meetings with Tony for two, four, seven and ten weeks after his arrival, since she wants to have more regular meetings than usual during his probationary period. At the first one, they agree his short-term objectives and complete a training and development plan.

At the end of Tony's probation period, Sally confirms his appointment. She is pleased with the way he has settled in, and he is already very committed to the Society and his work.

One-to-one supervision

You receive supervision from your manager, and provide supervision for members of your team. The British Red Cross supervision policy and good practice guidance for managers explains the Society's expectations of managers, and provides the documents you need to carry out and record supervision meetings. Your staff are entitled to regular, four to six weekly one-to-one supervision meetings with you, and these meetings are also your most important tool for managing their performance.

The most relevant British Red Cross management behaviours and competencies for 'One-to-one supervision' are the same as for 'Managing the performance of individuals and teams', as follows:

British Red Cross management behaviours

2	Recognise the implications of working within a charity and a voluntary organisation
3	Ensure equal opportunities and anti-discriminatory practice and promote diversity
4	Recognise and value the contribution of others
5	Take responsibility for your own decisions and actions and for your team
6	Demonstrate flexibility and open-mindedness
7	Support and share

British Red Cross management competencies

1	Leading people
2	Planning and managing projects and activities
6	Interpersonal and communication skills
8	Recruiting and selecting individuals
9	Managing and developing individuals
10	Responsibility for the well-being of others
11	Team-working

Case study one

One-to-one supervision

Although Rasheed tries to fit in regular supervision meetings with Moira, he often postpones them because there just isn't time. When he does meet with Moira, there is rarely time for much discussion, so he usually just mentions a few things he's noticed about her work, and allocates any new tasks. He keeps the meetings very informal, just telling her what to do, and he doesn't keep a written record. Moira asked about that once, but he said she should take notes – he doesn't have time.

Over the last couple of months, he has noticed that Moira seems less motivated and she has not done some of the things he asked her to, so he decides he must have a meeting with her. He goes to her office, puts his head round the door and says, 'Come on, supervision time!' As soon as she sits down, Rasheed tells her that he isn't satisfied with her work, and starts listing her mistakes and the various pieces of work he hasn't had from her. Moira is very upset. She says he isn't being fair, and anyway he is wrong – he can't tell her off for not doing something he never asked her to do. This leads to an argument about whether Rasheed had given her a particular piece of work. Rasheed is sure he did, and asks her to get her notes of the last meeting, three months ago. She has kept them, and she shows him that it isn't on the list. Rasheed says that this is another example of her inefficiency - she can't even write down what he says. Moira says angrily that it would help if he recorded their meetings and gave her a copy – then there couldn't be any mistakes. The meeting ends acrimoniously, with Rasheed telling Moira that she had better get her act together if she wants to go on working there.

Your regular one-to-one supervision meetings with your staff involve an open and honest review of their performance since the last meeting, followed by discussion about the work they will be carrying out over the coming period. They focus on the work plan, which you created with them, in a one-to-one supervision meeting, as the final stage in the business planning process. You may sometimes need to review the work plan itself, for example if new activities have been taken on. Since supervision involves a review of operating plan activities, meetings can also be used to collate the information you need to prepare your quarterly business plan monitoring reports, and to pass on the feedback received from senior management.

See 'Creating individual work plans for your team' page 74.

The first one-to-one supervision meeting after the individual's work plan has been agreed is used to agree their training and development plan for the coming year. This is then reviewed in subsequent supervision meetings. Have any of the training and development activities you identified been completed, and what progress is being made on ongoing development activities? Are the required outcomes being achieved? Does the individual need assistance in transferring their learning into the workplace?

See 'Creating training and development plans for your team', page 119.

The essential elements of supervision:

- **Line management** – responsibilities and accountability (you are responsible for ensuring that work achieves your and the Society's objectives, and is completed to the required standard)
- **Staff development** – reviewing training and development needs for performance in the current role, and ongoing professional and personal development
- **Facilitation** – enabling and assisting the individual to achieve their potential, grow in their post and take on new challenges (e.g. by offering support and advice, clarifying boundaries and encouraging creativity)

Finally, supervision should provide an opportunity for you and your member of staff to raise any other concerns, and they are always an opportunity to find out how the individual feels about their work.

The meetings can be quite informal, but you must ensure that they are structured. The supervision agreement which you negotiate with each member of staff includes the basic agenda for meetings, the frequency of meetings, how they will be recorded, etc. You can use the standard forms to record meetings, or use a different format, as long as key points and decisions are recorded. You should involve your member of staff in setting the agenda for each meeting, listing the 'standard items' and any additional matters either of you wants to discuss. A mutually agreed agenda will help you to ensure that you can both make best use of the opportunity to highlight any concerns, get feedback from each other, and agree plans to address any problems.

Refer to the Society's supervision policy and guidance for managers.

Supervision is a two-way process. Your member of staff should lead the review of their work – telling you what they have been working on, what they have achieved, and any problems they've had. You can then provide constructive feedback, not forgetting to give praise for work well done. When discussing tasks and objectives for the next few weeks, you should give the individual a chance to discuss any questions or issues they have about the work and your expectations, and agree the level of authority they have in relation to these tasks.

See page 64 for notes on giving and receiving feedback.

Supervision also provides you with an opportunity to seek feedback from your staff on your performance as their manager. What do they find helpful, and what would they like you to do differently? This is important for your own development, and will improve your working relationship with the individuals in your team – they won't all want to be managed in exactly the same way!

Key messages on supervision:

- Complete a supervision agreement with each member of your team
- Set regular times for supervision meetings – every four to six weeks (more frequent for new staff, and staff directly involved in delivering services)
- Agree and circulate the agenda before the meeting (items from the supervision agreement, plus other matters to be discussed)
- Review performance, set objectives and discuss training and development
- Focus discussion on the work plan and training and development plan
- Review competencies and behaviours required for the identified tasks and activities
- Make notes and provide a record for both parties
- Review the supervision agreement itself at regular intervals

Case study two

One-to-one supervision

Although Rasheed is busy, he always makes time for regular one-to-one supervision meetings with his staff, and allows time for a proper performance review, objective setting, and an open discussion of any issues which arise. The meetings are quite informal, but well-enough structured to be effective, and he provides his staff with a record of the meeting. He always starts by inviting staff to review their own performance, and books meetings well in advance so that they can prepare.

He has a supervision meeting booked with Moira, and having noticed that she seems less motivated and her work is less reliable than usual (she hasn't actually completed some of the things they discussed last time) he spends a bit of time thinking about how he should manage the meeting. He decides to start in the usual way, once they've agreed the agenda, by asking her to review the last six weeks, hoping that she will raise the issues which are worrying him.

In fact, she mentions it even before they discuss agenda items. Moira says that she knows she has fallen behind – he must have noticed. Rasheed asks her what the problem is – whether it is work-related, or whether she has something else on her mind. Moira says it's a bit of both. She is worried about her daughter who seems to have lost all interest in her schoolwork, and she feels guilty about spending so little time with the children. She supposes that she hasn't been concentrating at work, and now she is worried about falling behind as well. She doesn't feel she's coping.

As Moira is generally very conscientious, Rasheed feels this must be a genuine problem and, wanting to give her a bit of space, he suggests she take a bit of leave over half-term. At first Moira is reluctant – she doesn't want to fall further behind, but when Rasheed offers to help her prioritise, and to change some of her deadlines, she agrees that she would like a couple of days off the following week. They eventually agree on three days leave, and take this into account when setting her objectives. Rasheed invites her to come and talk to him if she needs to.

Overall, this seems to work well, and although she is still concerned about her daughter, Moira's performance improves significantly.

Appraisal

Managers receive appraisal from their own line manager, and appraise their staff. Your staff are entitled to an annual appraisal meeting, in accordance with the Society's policy and procedures. (Some managers appraise their staff more often, but this is not a British Red Cross requirement.) Appraisals form a vital part of performance management, with important benefits to the individual, to you as their manager, and to the Society. Carried out well, and with regular supervision meetings throughout the year, they should be a positive experience for both parties. If they are not handled well, the very idea of appraisal may be threatening, and the meeting will be difficult for you both.

The most relevant British Red Cross management behaviours and competencies for 'Appraisal' are the same as for 'Managing the performance of individuals and teams', as follows:

British Red Cross management behaviours

2 Recognise the implications of working within a charity and a voluntary organisation
3 Ensure equal opportunities and anti-discriminatory practice and promote diversity
4 Recognise and value the contribution of others
5 Take responsibility for your own decisions and actions and for your team
6 Demonstrate flexibility and open-mindedness
7 Support and share

British Red Cross management competencies

1 Leading people
2 Planning and managing projects and activities
6 Interpersonal and communication skills
8 Recruiting and selecting individuals
9 Managing and developing individuals
10 Responsibility for the well-being of others
11 Team-working

Case study one

Appraisal

Andy dreads appraisals with his staff. They often lead to disagreements, and sometimes actually make people's performance worse – staff seem to end up de-motivated.

He is particularly worried about appraising Sara. She hasn't been performing well, and he has a long list of things he wants to say to her – even more than last year, and that appraisal was pretty unpleasant! She argued over quite a few of the things he told her, and actually blamed him for some of her errors – saying that he hadn't explained what he wanted her to do clearly enough. This year he is going to have to grade her overall performance as unsatisfactory.

When Sara arrives, Andy begins to review her performance, noting his points on the appraisal form as he goes. To start with, Sara just looks at him, sitting with her arms folded, but when he mentions the problems she had with a particular project, she asks him how he can say that. He didn't say anything at the time, and she thought she'd done a good piece of work. Andy explained that he hadn't wanted to upset her - he knew she was pretty stressed at the time - so he had let it through. Sara says that of course she was stressed – he had given her an impossible task with an impossible deadline, and considering that he hadn't gone through it with her at all, she thought she'd done remarkably well to produce anything at all. The appraisal continues in much the same way. When he comments about her time-keeping, Sara denies there is a problem, and she is quite unpleasant when he says he wants her to do a report-writing course, although she needs it and she is always asking for training and development.

When they get to the end, Andy is about to tell her that he is marking her performance as below expectations, when she says that if he marks her as anything lower than satisfactory, she is leaving! 'No', says Andy, with a sigh, 'I am marking it as satisfactory – but I hope you will try and improve your work, or I'll have to mark you down next time'. Sara scowls.

The appraisal meeting is an opportunity to review all aspects of an individual's work, providing constructive feedback to aid the individual's understanding of what they do well, and areas in which they could improve or develop their skills and contribution.

It shouldn't be threatening, because there shouldn't be any surprises!

Refer to the Society's appraisal policy and guidance, which also contains the documentation you and your staff will require. Training is provided for managers and appraisees.

If you have been carrying out regular and honest supervisions throughout the year, your staff will already be aware of what they do well, and any areas where their performance needs to improve. Even if their performance does not meet your expectations, you should be able to identify things which have improved over the year, as well as highlighting areas where further improvement is required, and to provide 'balanced' feedback. If they have been performing well, the appraisal meeting is an opportunity to confirm and reinforce the positive feedback you have given them throughout the year. With the link between appraisal and reward, an exceptional performance may also lead to a merit award.

See page 64 for notes on giving and receiving feedback, and page 105 on managing poor performance.

Thorough preparation by both parties is vital. You and the appraisee should each work through the preparation form, thinking about the issues to be discussed and making notes.

It is important to let the individual review their own performance first (self-appraisal). Many people will be harder on themselves than you might be, and this gives you the opportunity to provide the positive feedback to balance their perception, while also confirming any areas where they need to improve. Of course, if someone has an unrealistic view of their achievements, you need to correct this, but however badly someone is doing, there will always be some positives.

The appraisal must give a fair and accurate picture of performance over the whole year. This can sometimes be difficult, particularly if a serious problem has arisen over the last couple of weeks, when it may be easy to forget about all the good work done in the previous 11 months! Current problems should be addressed, but you must ensure that you do not give them too much importance. On the other hand, if performance has improved significantly, you need to record performance in the earlier part of the year, and then emphasise how the individual has addressed this to reach their current level of performance.

For more information about the link between appraisal and reward, see the Society's appraisal guidance: the British Red Cross staff appraisal scheme. The Employee handbook also makes reference.

When assessing performance over the year, you should also bear in mind the link between appraisal and reward. An individual's appraisal will be one factor used to inform decisions about what annual merit award they receive, and this makes it even more important that you ensure that the appraisal record is balanced. Meeting performance targets is not enough; you also need to place an appropriate emphasis on relationships and interpersonal and team skills, and for managers include developing and leading people.

Some of the benefits of appraisal to the Society and the individual:

- opportunity to stand back from day-to-day pressures, review achievements and plan for the future
- managers shift from reacting to events to controlling them
- providing up-to-date information on performance and potential
- a direct link between performance and reward
- identifying strengths and addressing problem areas
- opportunity to praise good work
- improved morale
- increased motivation and commitment
- objective setting
- reviewing development needs
- providing feedback (both ways) and support
- assisting career planning

See setting 'SMARTER' objectives, page 80.

The appraisal meeting also provides an opportunity to discuss objectives for the future. This will cover activities identified in the work plan, which may itself need to be reviewed if new work is being taken on or the objectives revised. Objectives are set to make sure that the individual's work is directed towards achieving the Society's strategic priorities and corporate objectives, and to develop the individual's knowledge, skills and potential. You will then need to review their training and development plan, to enable them to develop the knowledge, skills and behaviours they need to perform effectively.

See page 119 for guidance on training and development plans.

Appraisal also provides an opportunity to discuss your staff's longer term aspirations for their career and personal and professional development. How do they envisage their career developing? What would they like to be doing in a couple of years time? Can their existing job be enhanced to benefit both the individual and the Society? Your role in this is to provide realistic feedback and, if appropriate, to help identify possible career pathways and any associated training and development needs. Either as the final stage in the appraisal meeting, or following on from it, you should work with the individual to draw up their career and personal development plan.

See page 127 for guidance on career and personal development plans.

Finally, the appraisal meeting involves a review of the expectations and responsibilities of the job. If the job has changed significantly over the previous year, it may be appropriate to revise the job description. If there are major changes, you should consult with your own line manager and human resources specialists, particularly as the changes may require a revised job grade. 'Core' job descriptions for standard posts should not normally be changed. If there seem to be good reasons for changing the job description for one of these posts, you must consult your own line manager and human resources. You should also be aware of 'job drift'. This happens when an individual gradually changes their own job, perhaps by taking on activities which interest them, or which they find particularly rewarding. While this may be appropriate, for example as part of a training and development plan, it should not happen without discussion and your explicit agreement. The job description should only be revised to take in these changes if the new job is designed to help achieve the Society's objectives.

360° feedback

360° feedback, which the Society is introducing in stages, is designed to assist your personal and professional development by giving you feedback from a wider range of sources. In addition to self-appraisal and appraisal by your line manager, the process involves feedback questionnaires which are completed by other people. For a manager this will include the people who report to them (upward feedback) and other colleagues (peer feedback). For non-managers it involves peer feedback. The feedback (which is anonymous) is summarised and fed back by a facilitator to the individual, not to their line manager, and the person receiving the feedback chooses whether to feed the information into their appraisal, or to keep it confidential and use the information privately to improve their performance. The feedback from your team will be particularly helpful to you, giving you invaluable information about how they perceive you as a manager, how they like being managed, and how you can best meet their needs. As you have the choice as to whether you pass the feedback on to your manager, it should not be 'threatening'.

Guidance and documentation for 360° feedback are provided in the appraisal policy and guidance materials, and training will be provided for individuals providing upward and peer feedback.

"I WAS EXPECTING SOMETHING A BIT MORE **CONFIDENTIAL** AND **SUPPORTIVE**."

Case study two

Appraisal

Andy is a bit concerned about his appraisal meeting with Sara. She hasn't been performing well, and although the issues have already been discussed in one-to-one supervision meetings, he will have to review them in the appraisal, and he thinks Sara may be upset about them going down on her record.

He spends more time than usual on preparation, thinking carefully about each matter and deciding whether to mention it if Sara does not raise it herself. He reminds himself that her performance has improved on many of the problems they have discussed over the year. Reassured that he can give Sara positive feedback as well as the negative, and deciding that, with the improvements she has made, he can justify a 'satisfactory' overall rating, he goes into the appraisal feeling happier than before.

When Sara arrives, Andy invites her to lead the review of her performance. She too has prepared well, as he encouraged her to. She raises many of the issues he had noted, and they find it quite easy to agree what should go on the form. Andy makes a point of mentioning improvements she has made over the year, as well as recording ongoing 'problems', and this seems to encourage Sara. Then they move to Sara's objectives and activities for the coming period. Knowing that Sara has sometimes felt that he was not explicit enough about his expectations, Andy takes care to check her understanding, and reassures her that she can always come to him for more guidance. They spend quite a time on Sara's training and development, reviewing the development activities she has undertaken during the year, and the outcomes she has achieved, and her current training and development plan.

Andy and Sara had previously agreed that they need to concentrate on training and development for her current role, and that they would not draw up a separate career and personal development plan, and Andy checks that Sara is still happy with this.

At the end of the appraisal, Andy tells her he is giving her a satisfactory rating, and will comment on the form that she has worked hard to improve her performance. Sara is delighted, and admits that she wasn't sure how he was going to rate her. Andy assures her that he is not just being nice – he knows she has made an effort to improve when he has identified a problem, and he feels that deserves recognition. He hopes she will continue to work on the other areas they identified, and Sara promises she will. Andy finishes the meeting confident that she will improve.

Managing poor performance

Managers probably dislike managing poor performance more than any other task. Some dislike it so much that they fail to tackle it at the appropriate time, doing little to draw the employee's attention to problems, until one day the situation 'blows up'.

The most relevant British Red Cross management behaviours and competencies for 'Managing poor performance', are found under:

British Red Cross management behaviours

2 Recognise the implications of working within a charity and a voluntary organisation
3 Ensure equal opportunities and anti-discriminatory practice and promote diversity
4 Recognise and value the contribution of others
5 Take responsibility for your own decisions and actions and for your team
6 Demonstrate flexibility and open-mindedness
7 Support and share

British Red Cross management competencies

1 Leading people
2 Planning and managing projects and activities
6 Interpersonal and communication skills
8 Recruiting and selecting individuals
9 Managing and developing individuals
10 Responsibility for the well-being of others
11 Team-working

Many human resources specialists can give examples of managers seeking advice about a situation, but doing nothing, and even writing positive appraisals which give no hint of the problems. Then one day the manager comes back to ask for advice on dismissing the employee. If this happens, managers have to appreciate that it is going to be difficult, if not impossible, to dismiss them for poor performance – the employee has lots of evidence of satisfactory performance in the past appraisals.

You should realise that not tackling issues at the right time is unfair to the employee, and the rest of your team. The individual has not been told that their work is not good enough, you have not helped them to identify how they can improve, and they have not had training, development or support to help them achieve the required standard. If they have 'failed', they can also claim that you, and the organisation, has failed them.

So how should you manage poor performance? The following may help:

- inform the individual at the right time that their performance is not acceptable, giving clear information about what aspects of their performance need to be improved
- explain how the individual's performance impacts on the work of the team
- reassure them that you are trying to help them to improve performance, not just criticising
- listen to what the employee has to say - what do they think is going wrong and why, and what can you do to help them to perform better?
- provide advice and assistance on how they can improve their performance
- reinforce all this in supervision, identifying what needs to be improved, clarifying what you expect, and providing advice and support
- work with the individual to identify training and development needs, and how they can be met
- make sure the individual understands what may happen if the situation does not improve, e.g. formal disciplinary procedures
- make sure that you review their progress at appropriate intervals: identify improvements and give praise for success, and clarify what further improvement is required
- bear in mind that problems outside work may be contributing to the situation – you may be able to offer personal support or some flexibility over working arrangements in the short or medium term, or advise them about other support available to them e.g. the Employee Assistance Programme. Help and understanding in the short term may lead to improved performance in the longer term.
- be honest in appraisals, acknowledging any improvements while ensuring that you are clear about what else is required, and make sure the appraisal record is accurate and fair

If relevant, refer to the Society's employment policies, e.g. carers and compassionate leave.

- if, having undertaken appropriate training and development, and despite your support, the individual has not improved their performance to the required standard, make sure that you are honest about the situation
- seek advice from human resources specialists if you are unsure about how best to proceed
- if you think the person is in the 'wrong job', and might succeed in a different role, can you modify the job so that they can succeed? Or should they consider applying for a different job?
- if you think that the situation warrants it, you can start disciplinary procedures, giving a verbal warning
- if you do begin disciplinary action, it is essential that you follow the Society's procedures. Seek advice if you need it!

Dealing with difficult, or aggressive, behaviours

Sometimes you may have to deal with an employee who becomes aggressive or emotional, and this can be difficult to handle effectively. How you react will depend on the situation, the individual and your relationship with them. The following simple tips may be helpful:

- try not to react aggressively or emotionally – remaining calm may help to defuse the situation
- listen very carefully to what is said – you need to explore and understand what has caused the situation
- be accepting of the anger or distress – everyone becomes angry and/or emotional at times
- sometimes it is best to deal with the issues straightaway; at other times it may be better to acknowledge the anger or distress, suggest that they go away and calm down, and resume the discussion and deal with the issues later
- even if the 'outburst' appears work related, remember that there may be problems outside work
- you need to understand the reasons for the behaviour, or to know that there are problems outside work. (You cannot demand to know about private problems, but you can ask if something is worrying them, and ask if it would help if they tell you about it.)
- if you realise that the individual is suffering from an unacceptable level of work-related stress, you must establish what the problems are and try to find ways of sorting them out. Adjusting workloads, providing training and development and/or support may all help
- remember that many things may be said in the heat of the

> Training is available on identifying and managing stress in your team – discuss your training and development needs with your manager.

> Remember the Society's 'duty of care' for employees, and check employment policies or seek advice from a human resources specialist.

Section 4

moment – you may need to explore later on whether the individual really means what they said
- if you became angry, you may also need to consider whether you meant everything you said!

Refer to the Society's disciplinary procedures and/or take advice from a human resources specialist.

It is different if an employee's behaviour is often difficult or aggressive or if someone is physically violent towards you or others. In this case you must inform them that their behaviour is unacceptable, and you may need to proceed into formal disciplinary procedures.

Managing good, or excellent, performance

With all the other demands on your time, it is sometimes the most effective members of your team who might miss out on the management and support they require. Every individual in your team, including those who can be trusted to get on with their work and are performing well, is entitled to your time and your support. If you devote inadequate time and effort to one-to-one supervision meetings, work planning, or identifying and meeting development needs, or simply forget to give praise for good work, even the most highly motivated individual may come to feel that their efforts are not valued. If you don't discuss their objectives and their work with them, how can you know if they find it sufficiently challenging or rewarding? Do they actually know how well they are performing?

You should also bear in mind that someone who is performing well may have the potential to take on further responsibility, or, with appropriate development, to move into a more demanding position within the Society. If this is the case, your role should be that of the enabler – helping them to identify where they want to go next, and how to get there – even if that does mean losing the most productive member of your team.

If you don't provide sufficient support to those who are performing well, you may find that they lose their motivation and their performance deteriorates, or that they leave to find new challenges.

Managing the performance of your team as a whole

In addition to managing the performance of each individual in your team, you will need to devote time and effort to the way the team performs as a whole.

The most relevant British Red Cross management behaviours and competencies for 'Managing the performance of your team as a whole', are found under:

British Red Cross management behaviours

2 Recognise the implications of working within a charity and a voluntary organisation
3 Ensure equal opportunities and anti-discriminatory practice and promote diversity
4 Recognise and value the contribution of others
5 Take responsibility for your own decisions and actions and for your team
6 Demonstrate flexibility and open-mindedness
7 Support and share

British Red Cross management competencies

1 Leading people
2 Planning and managing projects and activities
6 Interpersonal and communication skills
8 Recruiting and selecting individuals
9 Managing and developing individuals
10 Responsibility for the well-being of others
11 Team-working

Allocating activities, resources and opportunities amongst members of your team

Your team may carry out very different jobs with different responsibilities, or may all be doing similar work. Either way, it is important to ensure that your team is treated fairly and equitably, and that you are perceived by the team to do so. This does not mean treating each person the same – they will have different strengths and development needs, and may respond differently to different approaches.

In practice, being fair and equitable means that you should be able to justify the decisions you make. If you ask one of two people to take on additional responsibilities, you need to be able to justify that decision in much the same way as you would justify a recruitment or promotion decision. You may have a tendency to delegate particular

Delegation: giving people the freedom and authority to handle tasks on their own initiative, while ensuring they have the ability and support to achieve

What to delegate:
- routine tasks and associated decision-making
- complete tasks which will give a sense of achievement
- tasks which will help people to develop their knowledge and skills
- tasks which people can do better than you can

Do not delegate:
- ultimate responsibility for the task
- unpleasant tasks which are really your responsibility
- bits of tasks which will give little job satisfaction

How to delegate:
- make a list of tasks which could be delegated
- select people who are capable, willing and interested, using objective and equitable criteria
- explain the outcomes you require
- give them authority, while retaining overall responsibility
- provide coaching and guidance early on, then let them decide how to complete the task
- be available for help, but don't interfere
- always give credit for good work
- remember that making mistakes is acceptable and intelligent people learn from them!

kinds of work to particular individuals, perhaps because you know their approach will be similar to your own. Bear in mind that such decisions may have implications for the individual's professional development, and equal opportunities implications. You make decisions like this all the time, and it is easy to keep making the same ones just because you've always done it that way, and it has worked so far. Someone in your team may be feeling very aggrieved about other people getting all the interesting work and all the development opportunities!

Developing a team-working approach and the effectiveness of the team as a whole

Teams of people, working together, can often achieve more than the same individuals working alone, but this does not just happen when you put a group of people together!

Your staff will work effectively as a team if they:

- have a shared commitment to shared objectives
- have good decision-making processes
- have clear roles, responsibilities and leadership
- have sound relationships with other groups
- trust and respect each other
- share information
- are open about how they feel about things
- support each other
- analyse how the team performs and give each other constructive feedback
- value their differences – acknowledging each person's strengths and the contribution they make
- work through disagreements and conflict, rather than brushing them under the carpet
- feel they gain from the team as well as contributing to it

Team roles

You may have come across **Meredith Belbin's** work on the roles different people have a natural tendency to play when working in a team, regardless of their specialist skills and knowledge or the tasks they are there to do. Belbin described the following eight roles:

Implementer – turns ideas into practical plans and actions and carries them out (but may be inflexible and unresponsive to new ideas)

Coordinator – clarifies goals and controls how the team moves towards the objectives, making best use of team members' strengths (but may not be very creative or inspirational)

Shaper – shapes how the team's effort is applied, setting objectives and priorities and making it happen (but may be impatient and intolerant of those who are less focused)

Plant – creative, unorthodox and full of ideas, seeking new approaches (but may be impractical)

Resource investigator – will bring in ideas and resources from outside the team and create external contacts (but may lose enthusiasm during the implementation stage)

Monitor-evaluator – evaluates ideas, analyses problems and reviews progress, ensuring balanced decisions are made (but may be over-critical and over-serious)

Team-worker – will encourage and support others and work to improve communication and relationships (but may be indecisive, and dislike friction and competition)

Completer-finisher – ensures team does not make mistakes, identifies matters requiring close attention and maintains sense of urgency (impatient and intolerant of those who are less careful)

A well-balanced team will generally be more effective than one that is not. People often combine two or more of these 'preferred roles', but even so, you may not be able to ensure that they are all represented in your team. If you are aware that one or more are lacking, you can try to ensure that someone is taking on the 'missing role'.

As the manager, you can help to develop and maintain a team-working approach in all sorts of ways – the following are just some examples:

- use away-days or 'time away from the day job' to focus on such issues as the team's objectives and ways of working and help to build a shared commitment
- involve the team in planning and decision-making
- hold regular team meetings at which you encourage open discussion and constructive feedback
- share information with the team and encourage them to share with each other
- encourage the team to work through disagreements and address any conflict appropriately
- encourage social activities (but make sure no-one is excluded e.g. because of their culture, gender or sexuality).

Don't assume that you need to organise a 'team-building event'!

Relationships within the team: creative tension or destructive conflict?

Different experience, backgrounds and approaches – the diversity within your team – often results in more ideas, more creativity and more effective solutions. Even major disagreements about how to approach an issue can improve the final outcome, and you should encourage this kind of 'creative tension' within your team. However, the same kind of disagreement will be destructive if arguments become personalised, people criticise each other rather than challenging their ideas, and individuals put their effort into winning arguments rather than achieving a positive result. This unhealthy conflict must be addressed.

How you do that will depend on the situation. There is no right answer, but the following may help:

- you could stop the discussion, e.g. by saying 'I think this is all getting a bit too personal, can we go back to looking at the issues?' This may be effective if the conflict is minor and people generally have a good relationship, but problems may reoccur if the issues are not addressed
- you could stop the discussion and get people to think about what is happening, and share their feelings. This may well lead to a better outcome, but could unleash more accusations. Consider if these discussions should take place in the group, or in private
- you could take time out to re-think and re-focus
- if there is serious conflict within the team, it may be worth considering a team-building event, perhaps using an external facilitator – which means that you can participate alongside your team.

"OH YES, I ALWAYS TRY TO ENCOURAGE A BIT OF CREATIVE TENSION!"

Managing your manager

People who are dissatisfied with the way they are managed sometimes ask how they can manage their own manager, and the whole idea may be treated as something of a joke. In fact, the processes of managing your manager are key to developing an effective management relationship which will enable you to achieve your and the Society's objectives.

The most relevant British Red Cross management behaviours and competencies for 'Managing your manager', are found under:

British Red Cross management behaviours

2 Recognise the implications of working within a charity and a voluntary organisation
3 Ensure equal opportunities and anti-discriminatory practice and promote diversity
4 Recognise and value the contribution of others
5 Take responsibility for your own decisions and actions and for your team
6 Demonstrate flexibility and open-mindedness
7 Support and share

British Red Cross management competencies

1 Leading people
2 Planning and managing projects and activities
6 Interpersonal and communication skills
8 Recruiting and selecting individuals
9 Managing and developing individuals
10 Responsibility for the well-being of others
11 Team-working

Managing your performance effectively requires an ongoing exchange of information between you and your manager. As you work towards your agreed objectives, you need to keep your manager informed of your progress and any difficulties you are facing. Your manager will ask you questions about your work, and ask to see work in progress, but you may well be the best judge of what your manager needs to know – and to do – to enable you to achieve the required outcomes. You also have specialist knowledge and skills in your area of work, which your manager may lack, as well as direct experience of doing your various tasks. You will know how much support you need from your manager, and will respond better to particular management styles. You should be able to identify any learning and development you need to complete your tasks, and probably also know how you learn best – which kinds of training and development activities are most effective for you as an individual.

See 'Choosing the most appropriate management style', page 47.

As a result, you have a responsibility to help ensure that your manager can manage you effectively – you need to manage the information you give them, taking your agreed level of authority into account. Your manager should have informed you about the decisions you are authorised to take yourself, and those which need to be passed up the line. If you are ever in doubt about this, you should ask your manager for clarification. You and your manager also have a shared responsibility for developing and maintaining a good working relationship.

See 'Accountability and levels of authority', page 43.

You should also take into account that your manager can only give each individual a limited amount of time, especially if they manage a large team. You can help ensure that this time is spent on important issues.

For this, as for many other roles, good preparation is the key. Before any meeting with your manager, or communicating in any other way, ask yourself a few questions:

- what does my manager need to know about the work I am doing?
- what do I want my manager to do?
- do I need my manager's authority to proceed?
- what support do I need?
- what do I need my manager to know about me and my way of working?
- and how can I communicate all this effectively and concisely?

You might also ask whether you can take on particular tasks which will help your manager to be more effective, and possibly save time for both of you. Clearly, it is important that you prepare well for your one-to-one supervision meetings. Would it also make sense for you, rather than your manager, to draft the agenda? Could you record the outcomes of the meeting and copy it to your manager? Having been involved in discussions about the business plan for next year, could you draft your own individual work plan for discussion with your manager? Could you identify your own learning needs, think about how these needs could be met most effectively, and draft your own training and development plan? Your manager retains responsibility for decisions about all these matters, but your taking on these tasks may result in better decisions (because you know more about your work and yourself than your manager does), as well as saving your manager time, and giving you a greater sense of ownership.

If you think taking on such tasks would help your manager to manage you more effectively, could you ask members of your team to do the same?

See also 'One-to-one supervision', page 95; 'Creating individual work plans for your team', page 74, and 'Creating training and development plans for your team', page 119.

Dealing with difficult or inappropriate management behaviour

Managers, like everyone else, sometimes behave inappropriately, particularly if they are suffering from work-related or other stress. Unfortunately, some managers also bully or harass their staff in a completely inappropriate manner. It can be difficult to cope with one's manager becoming aggressive or emotional, and bullying and harassment are increasingly recognised as a major source of stress in the workplace. What can you do if your manager behaves inappropriately?

Stress-related behaviour

See 'Dealing with difficult or aggressive behaviours', page 107.

How should you respond if your manager suddenly becomes angry or emotional? While you may not be in a position to help your manager to address issues that are causing work-related stress, many of the tips on dealing with difficult or aggressive behaviours will also help to defuse the situation if your manager is aggressive, angry or emotional. Remaining calm yourself, being non-judgemental, and trying to be tactful and supportive, will all help to ensure that your relationship with your manager is not damaged in the longer term. In some situations, you and other members of the team may also be able to provide practical support which will help your manager deal with work-related and perhaps also personal problems, for example by offering to take on some of their tasks. In a good relationship, you may also be able to advise your manager, or signpost them to external support.

Bullying and harassment

It is different if you are bullied or harassed by your manager. No-one should suffer from this kind of behaviour, but the Society can only address the situation if you are prepared to take action. Ideally, you should first raise the matter with your manager, explaining how their behaviour affects you and why it is unacceptable. Your manager may not be aware of what they are doing, and may be able to change their behaviour if it is pointed out to them. If you do this, and their behaviour does not change, you will need to take further action. You can raise the matter, either formally or informally, with your manager's line manager, or you may prefer to seek advice and assistance from a human resources specialist. The British Red Cross considers that bullying constitutes a form of harassment, and any kind of bullying, for whatever reason, is unacceptable to the Society. It would not want any member of staff to suffer in silence, or to resign, because of the inappropriate behaviour of their manager.

Refer to the Society's harassment policy and procedures. The grievance procedure may also be relevant.

If you are being bullied or harassed by your manager, or are suffering from stress for other reasons, you must ensure that you do not take this out on your team. Excessive workloads or bullying are not an excuse for inappropriate behaviour towards your own team. If you find yourself shouting at your team or seem prone to emotional outbursts, you must ensure that you take appropriate action to address whatever is causing your stress, before your team begins to suffer as well.

Bullying can be physical, verbal or emotional.
Examples include:

- **Physical** – taking belongings, hitting, pushing and other forms of violence
- **Verbal** – name calling, criticising in public, teasing and other hurtful or insulting remarks
- **Emotional** – spreading stories and rumours, exclusion from social groups, ridicule and humiliation

Developing your team for effective performance in their existing roles

You and the people in your team have a shared responsibility to ensure that they have the knowledge and skills – or competencies – required to carry out the tasks and activities in their work plans.

Personal and professional or career development are considred in the next section.

The most relevant British Red Cross management behaviours and competencies for 'Developing your team' are found under:

British Red Cross management behaviours

5 Take responsibility for your own decisions and actions and for your team

British Red Cross management competencies

6 Interpersonal and communication skills
9 Managing and developing individuals
11 Team-working

As a manager, you must make sure that members of your team have the knowledge and skills to perform effectively in their jobs, and are able to complete any tasks allocated to them to the required standard. Each individual should also take responsibility for identifying their own training and development needs, and discussing with you how these needs can be met.

See the training and development menu (Appendix 5), and the training and development plan (Appendix 6).

Regular one-to-one supervision, accurate identification of competency gaps or learning needs, and the creation of a realistic training and development plan are key to successfully managing your team's development.

Case study one

Developing your team for effective perfomance in their existing roles

As the final step in the business planning process, Tim spends time with each individual in his team, drawing up their work plans and making sure they understand the activities allocated to them for the coming year. Osman is familiar with most of his tasks, which have not changed much from the previous year. However, he tells Tim that, while he is keen to take on something new, he is concerned about whether he has the skills and knowledge to complete the new project he has been given.

Osman generally produces work of a high standard, but Tim feels that he lacks confidence. Thinking that all he needs is a bit of encouragement, he tells Osman that he is sure he will be able to cope; all he needs is the confidence to try.

Osman goes away and does his best, but finds that he is struggling. He is afraid to ask Tim for help since Tim obviously thinks he should be able to do it, but he cannot find anyone else to ask. Knowing that the project is important, he begins working late and taking work home, but he isn't making much progress. He is also starting to fall behind on his routine tasks. He starts having problems sleeping at night.

Tim is unaware of the problem until a couple of months later, when Osman comes into his office and, apologising profusely for failing to complete a particular piece of work by the deadline, and for letting him down, tells Tim that he simply cannot cope. He says he is sorry, "but I am just not as good at my job as you thought I was".

Creating training and development plans for your team

The final task in the annual business planning process is the preparation of individual work plans. Your staff should already have a pretty good idea of what they will be doing in the coming year, because you will have involved them in creating the team's business plan, but there is still a need for detailed work planning.

For guidance on preparing individual work plans, see page 74.

Having agreed the work plan in a one-to-one supervision meeting, you need to discuss whether the individual has all the skills and knowledge needed to complete their tasks, and identify any competency or behaviour gaps. You will have made an informal assessment of their training and development needs when you put together the operating plan and budget (see page 74), but now need to conduct a more thorough analysis. You might ask the individual to prepare for this by identifying the knowledge and skills required for each activity and considering how any training and development needs could be met. You should review this with them, providing guidance on the knowledge and skills required to carry out the work, and constructive feedback on their existing skills, and then work together to establish how their needs can best be met.

For information and guidance on one-to-one supervision, see page 95.

Creating a training and development plan – a step-by-step guide

- create this plan with your member of staff in supervision as soon as their work plan has been agreed
- ensure that your member of staff leads the discussion about their training and development needs
- only list training/development activities required for effective performance in the existing role, i.e. for activities identified in the individual's current work plan (see also Creating career and personal development plans, page 127)

1. identify the key skills, knowledge and behaviours required to carry out each activity listed in the work plan (for managers, this will include relevant management behaviours and competencies)
2. compare these requirements with the individual's existing skills, knowledge and behaviours, and identify any 'gaps' – their training and development needs
3. for each 'gap' you identify, discuss the outcomes you jointly require from the training and development the individual needs to undertake
4. list these outcomes in the first column of the training and development plan. Use additional sheets if required
5. for each training and development outcome, discuss how it can best be achieved, referring to the training and development menu as required. Bear in mind the individual's preferred learning style and seek advice if you need it
6. note the agreed training courses and/or other development activities in the second column, also noting, in columns 3, 4 and 5, who is responsible for implementing the activity, any other people involved (e.g. who will provide coaching), and the agreed date for completion. The final column allows you to tick off activities as they are completed

Refer to:
- The staff development policy
- The training and development menu (see Appendix 5)

If you need help – seek advice:

- from training and development specialists:
  - at UK Office – Training and Development Specialists
  - at Territory – Training and Developing Specialists
- or from colleagues with relevant knowledge and experience

Some of the activities listed on pages 122-125 are fairly new to the Society or 'under development'. At the time of writing, the support and assistance available from the Staff and Management Development Team may be limited, but this will improve as guidance materials, etc, are developed.

Note that the training and development activities described below are also relevant to career and personal development (see page 126).

Do not assume that a training course is the answer! Other development activities may be more effective in achieving the outcomes you need, and may cost less. When selecting the most appropriate activities, you should consider differences in learning styles – what one person gains from attending a course, another might learn best through coaching or reading a book. Be creative! Some of the development activities available to you are described below, and are also listed in the training and development menu, Appendix 5.

Once the training and development plan for the new work plan has been created, it must be reviewed at regular intervals. You should include discussions about training and development and the outcomes of development activities in supervision meetings and annual appraisals.

British Red Cross (internal) training courses

The British Red Cross organises a variety of training courses at UK Office and in the Territories and Areas. Having evaluated the options and studied the course content, you may decide that your member of staff should attend one.

The Staff and Management Development Team at National Headquarters issues an annual Staff and Management Development Brochure. The Territory Team co-ordinates local courses and initiatives.

To get maximum benefit from a training course, you should meet to discuss what the individual hopes to gain from attending and how to ensure that learning is translated into improved performance in the work place. You should encourage them to note key points during the course, and meet with them soon afterwards to agree an action plan to make sure that learning is applied and new skills practised. It will be useful to arrange a review meeting some months later to check progress and see whether the training and development needs have been met. An action plan form for the pre- and post-course meetings is provided in the Staff and Management Development Brochure.

External training providers

If the Society does not provide a course which meets the individual's needs, you may wish to investigate training courses run by external providers. A huge range of courses is available: some excellent, and some very poor. The Staff Development Team at UK Office or the Territory can provide advice. Do consult them before arranging an external course, the Society may have negotiated a national or local deal with an appropriate provider.

Training courses are only effective if:

- the course content is relevant and meets the development needs
- the 'level' is appropriate
- you and the participant have a shared understanding of the desired outcomes
- the participant wants to be there and to learn, and takes responsibility for their own learning
- you and the participant work together to develop an action plan, and you ensure that they have appropriate opportunities to apply the learning in the workplace
- learning and its application are reviewed some time after the training event

Training courses are not the only way to learn – and may not be the most effective, or cost-effective, method

Coaching

Coaching is a process in which one person facilitates the development and learning of another. It involves asking questions, active listening and constructive feedback. The coach helps the learner to clarify their goals and objectives, and generate their own solutions. As their manager, you may feel that you are best placed to coach members of your team. This may be right, but it may be equally or more effective for coaching to be provided by someone else: an expert in the relevant field, an experienced colleague, or an outside consultant.

Typically, coaching involves:

- helping a learner to clarify goals and increase motivation for development and improved performance
- helping a learner to increase their understanding of their development needs (the gap between what they want to do, and their current performance)

It is **not** instructing or teaching

Coaching skills:

- Active listening
- Questioning to develop awareness
- Summarising
- Providing feedback
- Problem-solving
- Making suggestions
- Knowing when to be directive, and when not

The British Red Cross offers an NVQ Award (C25 – facilitate individual learning through coaching) and the Society is hoping to develop additional training and support for managers and others undertaking coaching responsibilities

The GROW method:

G – the Goal of the coaching session, specific and measurable
R – Reality check – where the learner is now
O – generating Options and actions, e.g. by board-blasting
W – Wrap up – when the learner is committed to action, the session is reviewed

Bear in mind that coaching another person is also developmental: if one member of your team coaches another, both are learning.

As with any development activity, you must ensure that you discuss the desired outcomes with the individual in advance, and review learning and development with them at appropriate intervals.

The Society will develop guidance for managers on coaching – coaching members of your own team and/or identifying others who can coach individuals.

Mentoring

Mentoring is a one-to-one relationship between an individual and a more experienced person outside the line management structure, who can guide and help them to learn and develop. The relationship is confidential and non-judgemental. Meetings need not be regular, and may be spread over months or years.

Mentoring is often focused on career and longer term professional development. However, it can also assist in developing staff for performance in their current role

The British Red Cross is hoping to develop a formal mentoring scheme. In the meantime, you can obtain advice and guidance on mentoring from the Staff and Management Development Team at UK Office.

You cannot be a mentor to members of your own team, but you still have an important role to play:

- working with your staff to clarify their and your objectives
- ensuring they understand the nature and limitations of mentoring
- helping to identify an appropriate mentor. (Give the employee some choice: the personal relationship between mentor and mentee is important!)
- accepting the confidentiality of the mentor and mentee relationship, while encouraging both parties to talk to you about practical developments
- reviewing these practical outcomes during your regular one-to-one supervision meetings.

Shadowing

Shadowing involves moving an individual from their normal role into a different working environment for an agreed period of time, so they learn by working alongside others. The individual can shadow someone in another organisation or be placed in a different department or division. The purpose is to learn relevant skills from people working in the other department or organisation, or improve their understanding of the work carried out there. The benefits can be considerable. A British Red Cross employee who is working in a partnership with another voluntary organisation or statutory service could develop their understanding of the culture of the other organisation, and appreciate some of the difficulties they face. Similar benefits would be obtained by UK Office staff being seconded to a Territory or Area, or vice versa. Individuals can also shadow people in their 'internal client groups'. Reciprocal arrangements are often helpful, with improved communication and increased understanding, in addition to any new skills picked up from colleagues.

The Society intends to develop shadowing as a method of developing managers and staff. Advice is available from the Staff and Management Development Team at UK Office, or other human resources specialists.

Job swaps

Job swapping involves two people exchanging roles for a limited period, often just a day, so each gains an understanding of the other's role, and the culture in which they work. As for shadowing, the swap can be within the organisation, or with a partner or supplier. Depending on the similarity between the two people's roles, it may not be practical for a complete swap – you may have to combine it with shadowing.

Advice and guidance on job swaps is available from the Staff and Management Development Team at UK Office, or other human resources specialists.

Action learning:

- focuses on real-life problems
- motivates people to take responsibility for their own learning
- encourages implementation
- provides constructive feedback
- facilitates mutually supportive relationships and networking

Action learning sets

An action learning set is a group of individuals, perhaps five or six people, with similar roles or working on similar issues. They come together to learn by exchanging experiences on real-life problems and situations. The group, working with a facilitator, negotiates the use of their meeting time to test and question each other about a challenging work-related problem or issue. The facilitator may suggest external sources of expertise and assist the group to analyse the situation, explore options and decide on action, and then also facilitate discussion about the outcomes.

The British Red Cross is hoping to develop more action learning sets. Information from the Staff and Management Development Team at UK Office.

Advice and guidance on all these development methods is available from the Management Development Team at National Headquarters.

Learning from tasks

Learning and development can also be achieved by taking on a new role and responsibilities, for example through **job rotation**, **secondment**, '**acting up**', taking on management of a **project**, or participation in a **project team** or **working group**. These all provide opportunities to develop new skills and knowledge, and bring additional benefits through exposure to different cultures and ways of working, and opportunities for networking. Your role as manager includes identifying appropriate opportunities, ensuring the individual has sufficient knowledge and skills to take on the new role or task, providing support, and reviewing performance and development.

For information about job rotation, secondment and 'acting up', see the training and development menu, Appendix 5. For advice and guidance, contact the UK Personnel Unit, or your Territory Human Resources Manager.

For guidance on delegation, see also 'Managing the performance of your team as a whole', page 109, and also page 45.

You can also assist development by delegating new tasks and responsibilities to an individual, while providing support and reviewing their progress and performance at regular intervals. Managers are sometimes reluctant to delegate important tasks to people unless they already have a lot of experience, in case it goes wrong, particularly if they feel mistakes might reflect badly on their own performance. However, actually doing a task is often the best way of learning, and it is important to achieve an appropriate balance – how else can people gain experience? Managers should take reasonable risks in providing opportunities to learn, but must also manage the risk through regular supervision, so that learning takes place and mistakes can be rectified. Taking appropriate risks in order to facilitate learning is a key step towards encouraging individual learning and towards developing a learning organisation.

Study programmes and academic qualifications

The Society has a limited budget available to support individuals wishing to undertake part-time external study programmes that lead to recognised qualifications. Financial support can only be provided if certain criteria are met, and in all but the most exceptional circumstances only part funding would be available. In certain circumstances, the Society may be able to approve limited study leave.

Information and guidance on study programmes is available from the Staff and Management Development Team at UK Office. They can advise on management programmes.

At the time of writing, the Society is developing criteria for financial support for the study programmes.

These are likely to include:

- training/development need identified with manager in supervision or appraisal
- relevance to existing job or work which the employee will take on
- benefits to the Society as well as to the individual

Case study two

Developing your team for effective performance in their existing roles

As the final step in the business planning process, Tim devotes a one-to-one supervision meeting with each person in his team to drawing up a work plan, making sure they understand the activities allocated to them for the coming year, and identifying their training and development needs. Osman is familiar with most of his tasks, which have not changed much from the previous year. However, he tells Tim that, while he is keen to take on something new, he is bit concerned about whether he has the skills and background knowledge to complete the new project he has been given.

Osman generally produces work of a high standard, but lacks self-confidence. Tim thinks he could probably complete the task without further training/development, but Osman disagrees, saying that the main issue is his lack of practical experience in certain areas.

Tim discusses Osman's needs with the Staff Development Team, who recommend a one-day external course. Tim also identifies a person from another Department who would be willing to provide coaching on an ad hoc basis and has relevant expertise. He reminds Osman that he can also ask him for assistance at any time.

Osman completes the training course. He finds his coach very supportive in helping him to identify what he needs to achieve, and he and Tim review his progress in his regular supervision meetings. The project and his routine tasks are all completed on time, and Tim notes that Osman is more confident in all his work.

Supporting your team's career and personal development

The Society's first priority in providing training and development for managers and staff is to ensure that they develop the knowledge, skills and behaviours for effective performance in their existing role. However, the Society also benefits from supporting the longer term personal and professional development of individuals, whether to enhance performance in their current role, e.g. by taking on additional responsibilities, or to enable them to progress their careers. This approach encourages individuals to take responsibility for their own learning and development and supports a culture of learning and questioning, which is important if the Society is to move towards becoming a learning organisation.

The most relevant British Red Cross management behaviours and competencies for 'Supporting your team's career and personal development' are found under:

British Red Cross management behaviours

5 Take responsibility for your own decisions and actions and for your team

British Red Cross management competencies

6 Interpersonal and communication skills
9 Managing and developing individuals
11 Team-working

Case study one

Supporting your team's career and personal development

Towards the end of her appraisal Pam asks Toyin, her manager, if they can discuss her longer term future with the Society. After two years in her job, she is wondering about some kind of career progression, but she is unsure what the possibilities might be and what training and development she should be considering.

Toyin looks at her watch and tells Pam that this isn't her job – Pam needs to take responsibility for planning her career, and although Toyin would like to help, Pam has to recognise that the Society cannot afford to pay for that kind of thing. 'Anyway', she says, 'I am not sure that you are ready for promotion – there is still room for improvement in your current job.'

Pam can see that she isn't going to get very far with this, but suggests that some of the training and development she could do for her existing work could also help with future career progression, if she chooses the right activities. Couldn't Toyin advise her on that, and take it into account when they put together her training and development plan? She knows she isn't ready for promotion yet. Toyin is not encouraging, saying that her responsibility as a manager is to ensure that Pam achieves the work objectives they have just agreed – and that's where it stops. Pam goes away wondering whether she should start looking outside the Society – perhaps another employer would be more supportive.

You should discuss the longer term objectives, career aspirations (if relevant), and broader personal and professional development with the individuals you manage as part of their appraisal, and help them to draw up a career and personal development plan.

Creating career and personal development plans for your team

Employees who are seeking career advancement, whether in the near future or at some later date, will need to identify the kind of position they might be able to move to, and the training and development they need to have a realistic chance of being appointed to such a post. The Society cannot guarantee career advancement, but you should encourage and support any members of your team who wish to progress their careers, and help them to draw up development plans and strategies to achieve their goals. Managers are sometimes concerned that the Society may provide support, including the financial cost of training and development, to individuals who wish to progress their careers, only to find that they move to another organisation. This may be a risk, but the Society benefits from their knowledge and skills while they are learning and from their motivation and commitment, even if they do not then stay with the Society, so it is a reasonable and justifiable risk. If they do stay, and move into a more responsible post, the Society benefits even more. While the Society has a limited budget for training and development and must give priority to training and development for performance in the current role, it is important to achieve an appropriate balance between this requirement, and longer term development.

For information about training and development activities which might be incorporated into the career and personal development plan see pages 121-125.

Refer also to the training and development menu (Appendix 5), and the career and personal development plan (Appendix 7).

Your role in supporting individuals who wish to progress their careers:

- provide honest feedback on whether their aspirations are realistic
- advise them on possible career pathways and/or signpost them to where good advice may be available (seek advice yourself from a human resources specialist if you need to)
- make sure they understand that the British Red Cross cannot guarantee career progression within the Society
- advise them on drawing up a career strategy and identifying the associated training and development needs and/or signpost appropriately
- work with them to draw up a career and personal development plan
- inform them of the amount of support the Society may or may not be able to give them (seek advice from the Staff and Management Development Team at UK Office)

Note that while the Society generally encourages managers and staff to give due consideration to longer term professional and/or personal development, it may not be appropriate to complete a career and personal development plan with every member of your team every year.

- Some individuals are content to continue in their existing role without job enrichment or further professional or personal development, or may feel that their circumstances will not allow any development beyond that required for their work plan.
- Similarly, if an individual is not performing adequately in their existing role, you may feel it inappropriate to devote attention to longer-term professional or personal development.

Employees who are not seeking career progression may also be interested in professional development beyond that required for their existing work, either to enhance their performance on current tasks, or to enable them to take on additional tasks and responsibilities. Such 'job enrichment' and the associated training and development can benefit you, as the manager, and the Society as a whole, as well as the individual. You should work with the individual to identify how their job can be enriched (e.g. the new responsibilities they might take on) and the training and development they would need, and include this on a career and personal development plan. At the same time, you should be aware of the possibility of unplanned 'job drift' (see page 102).

Personal development is defined as the process by which an individual develops themselves, and may include development in areas unrelated to their job. The Society cannot commit resources to development activities which have no impact on their contribution to the Society's work, but you should support and assist individuals who are undertaking non-job related development when you can. This may help to ensure an appropriate balance between work and other aspects of the individual's life, and may also have an indirect impact on the individual's effectiveness, by developing confidence and promoting the positive approach to individual learning which is so important to the Society.

The career and personal development plan, although agreed during or immediately after appraisal, should be regularly reviewed with the individual during supervision, alongside the training and development plan.

Creating a career and personal development plan – a step-by-step guide

- create this plan following discussion in the annual appraisal meeting of the individual's longer term career aspirations and/or their desire for professional and personal development
- ensure that your member of staff leads the discussion – your role is to provide constructive feedback and help to ensure that their aspirations and the agreed plan are realistic
- you will need to agree the extent to which the Society can support the activities, whether with a financial contribution or allocating time during working hours. You can include activities they wish to complete in their own time and finance themselves, if you agree this is appropriate

1. identify possible (realistic) career pathways (if relevant), how their job can be enhanced through professional development and/or any other professional or personal development aspirations (seek advice, e.g. from a human resources specialist, if required)
2. discuss whether having a mentor would be helpful – if so, help them to identify an appropriate person and to develop a mentoring agreement
3. if you have agreed a possible career pathway or identified ways of enriching their existing job, identify the key skills, knowledge and behaviours required to fulfil their aspirations (for management roles, this will include relevant management behaviours and competencies)
4. compare these requirements with their existing skills, knowledge and behaviours and identify any 'gaps' – their training and development needs
5. for each 'gap' you identify, discuss the outcomes the individual requires from training and development and list these in the first column of the career and personal development plan
6. if the professional or personal development is not related to any particular career aspirations or job enhancement, simply list the outcomes you have agreed in this column
7. for each training and development outcome, discuss how it can best be achieved, referring to the training and development menu as required – bear in mind the individual's preferred learning style and seek advice if you need it
8. note the agreed training courses and/or other development activities in the second column and complete columns 3, 4 and 5. The final column allows you to tick off activities as they are completed.

Case study two

Supporting your team's career and personal development

Towards the end of her appraisal, Pam asks Toyin, her manager, if they can discuss her longer term future with the Society. After two years in her job, she is wondering about some kind of career progression, but is unsure what the possibilities might be and what training and development she should be considering.

Toyin asks Pam to say a bit more about this. Does she have any ideas about the kind of position she might like to move to? Or when? Pam doesn't feel she knows enough about other positions to know what might be realistic. She emphasises that she doesn't think she is ready to move on yet, but thinks she should start planning ahead. She would like to stay with the British Red Cross if possible.

Toyin agrees that Pam has the potential to progress within the British Red Cross and suggests that, in order to gain sufficient experience, it may be realistic to think about moving on in about two years time. Pam says that feels about right. They discuss possibilities, but neither is confident that they are not missing possible pathways, so Toyin suggests that Pam has a meeting with a human resources specialist. The human resources specialist could also arrange for Pam to meet with, or shadow, a current post-holder, and help her identify her training and development needs for any post they come up with.

Toyin records Pam's interest and the action they have agreed on the appraisal form, and says that when they have a clearer idea of possible career pathways, they can meet again to look at training and development, and put together a career and personal development plan.

Concluding remarks

If you have read through the good practice guide for managers to reach this point, you should now have a good overview of the Society's expectations of you as a manager, in terms of a framework of key management tasks and activities supported by management behaviours and competencies, although for details of the latter you will also have to read Appendices 2 and 3.

However, an overview is not enough. It is essential that you use the guidance in this booklet, the various policies and procedures to which it refers, and the management behaviours and competencies. This will help you to develop your own behaviours, knowledge and skills and improve your effectiveness as a manager, enabling you to manage, support and develop your team.

The guide is designed for you to use as a management tool. You should refer to it, with your line manager, when discussing your various management tasks, refer to it as you work on those tasks, and use it to identify your learning needs and draw up your training and development plan. If you manage other managers, you should use it during their induction and your one-to-one supervision meetings with them, to help them understand your, and the Society's expectations, and identify how they can develop their behaviours, competencies and effectiveness.

If the good practice guide just sits on your shelf, it is not achieving its purpose! Please use it.

The Staff and Management Development Team, at UK Office, would also value your views on how the guide can be improved. This is the first such guide produced for British Red Cross managers, and any feedback you can give would be very welcome.

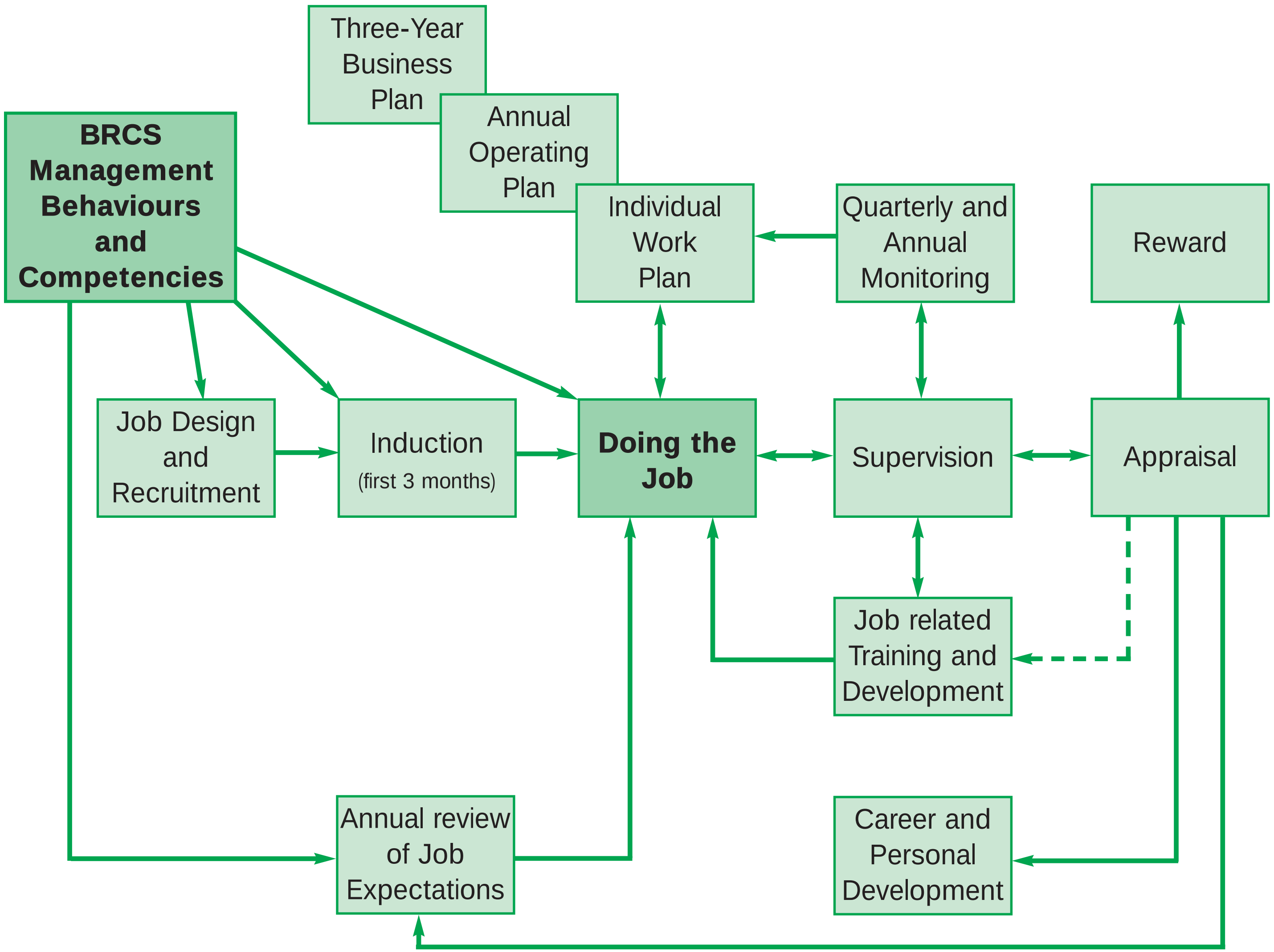
5

Index of case studies

Index of case studies

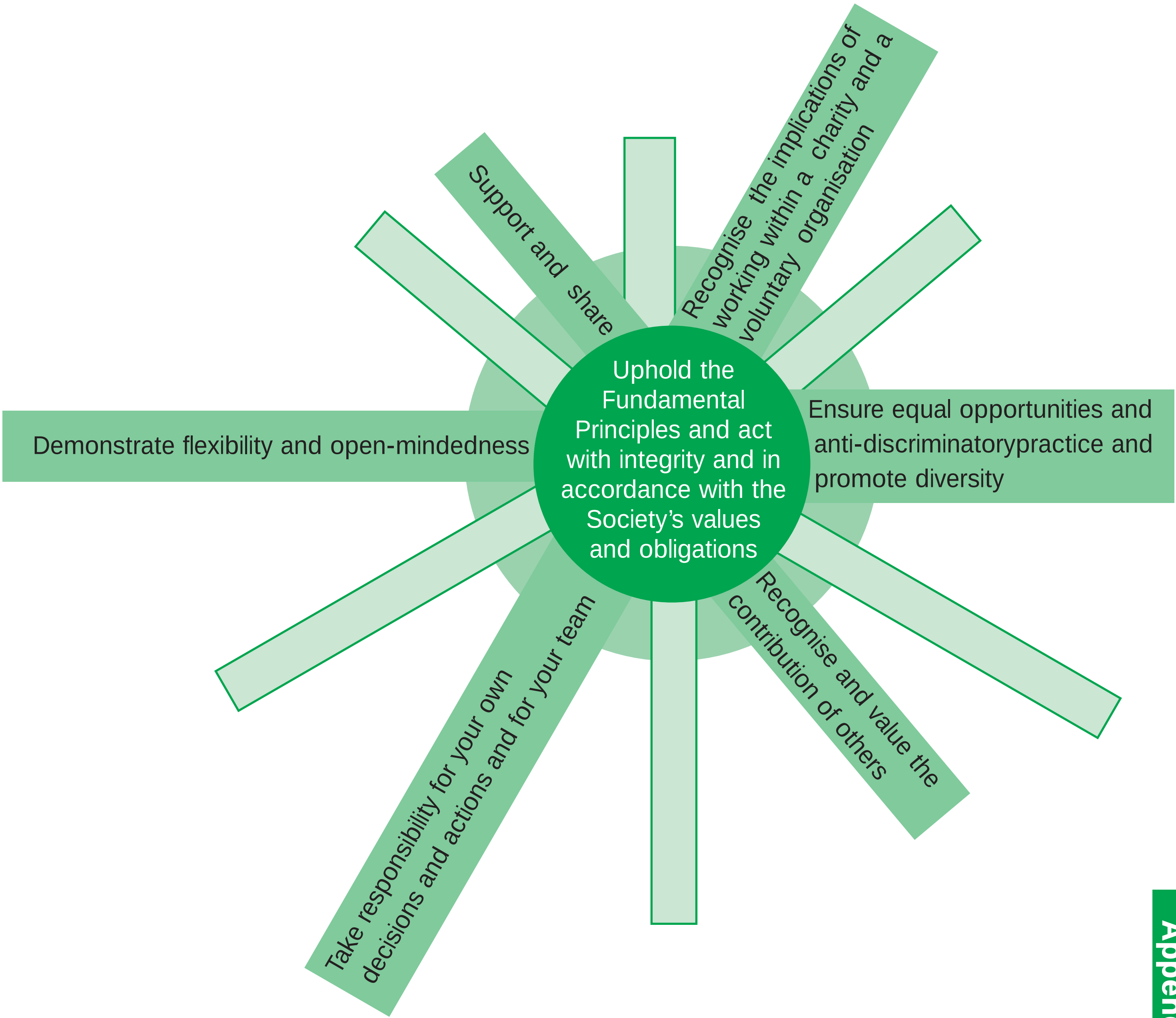
6 Appendices

Appendix 1
British Red Cross management framework



Appendix 2

The British Red Cross management behaviours



Appendix 2

The British Red Cross management behaviours

The British Red Cross expects and requires its managers to:

1 Uphold the Fundamental Principles and act with integrity and in accordance with the Society's values and obligations, by:

- i promoting the British Red Cross and the Movement's Fundamental Principles, internally and externally
- ii never compromising the Fundamental Principles; taking an active stance in upholding the Fundamental Principles, and supporting others to do the same
- iii actively avoiding behaviours and statements which may damage perceptions of the British Red Cross and the Society's reputation, e.g. statements which undermine the Society's neutrality
- iv taking appropriate action when others violate the Fundamental Principles, including the use of disciplinary procedures when appropriate
- v demonstrating an awareness of the Society's obligations in relation to the Movement, international humanitarian law, and national law, (e.g. in relation to the use of the red cross emblem), and helping to ensure these obligations are upheld
- vi acting with integrity at all times

2 Recognise the implications of working within a charity and a voluntary organisation, by:

- i acknowledging that working for a 'cause-led' organisation in the voluntary sector requires a commitment to the organisation's volunteers, donors and other stakeholders and to the principle of governance by trustees who are themselves volunteers, and working to ensure that stakeholders' legitimate expectations are met
- ii recognising, and helping to ensure that all volunteers, staff and managers recognise that they have an obligation to work towards achieving the Society's vision, mission and objectives and must ensure that all their actions promote its effectiveness
- iii ensuring that the high level of commitment of individual volunteers and members of staff to the organisation and the 'cause' is welcomed and acknowledged, whilst also ensuring that committed individuals are not exploited in ways which may be damaging to them and/or affect their contribution to the Society's work
- iv communicating the British Red Cross 'message' to internal and external audiences
- v recognising the implications of the organisation's charitable status, accepting the legal and financial constraints this imposes, and avoiding extravagant or wasteful use of financial and other resources

3 Ensure equal opportunities and anti-discriminatory practice and promote diversity, by:

- i upholding the Society's equal opportunities policy and acting as a role model to others, demonstrating a high level of commitment to anti-discriminatory behaviour and practice
- ii demonstrating respect for the rights and the dignity of all individuals, and treating people fairly and with understanding and sensitivity
- iii actively demonstrating an appreciation of the benefits of diversity, and working to ensure that British Red Cross becomes a genuinely inclusive organisation
- iv making reasonable adjustments to accommodate individual requirements, e.g. for an individual with a disability
- v recognising the discriminatory effects of stereotyping and prejudice, taking care to avoid stereotyping others, and demonstrating a willingness to examine one's own prejudices and to take action to address them
- vi actively avoiding inappropriate and unacceptable language and behaviours, e.g. language which is insulting or demeaning to others, such as racist 'jokes', etc
- vii challenging inappropriate and unacceptable language and behaviours, and supporting and encouraging others to do the same
- viii responding positively and constructively when challenged by others, and actively seeking feedback which may help alter inappropriate or unacceptable language and behaviour
- ix actively encouraging and supporting individuals who wish to raise issues relating to discriminatory practice, and demonstrating a willingness to take appropriate action through the relevant procedures

4 Recognise and value the contribution of others, by:

- i showing appreciation for all work done, including simple and routine work
- ii ensuring that the individual and/or team responsible receives credit for their contributions, achievements and ideas
- iii showing particular appreciation of work of a very high standard, innovative work, exceptional effort, and work requiring extra time and/or overcoming difficulties, etc
- iv rewarding such work in the most appropriate ways, whether private praise, or public acknowledgement, performance-related pay, or just saying 'thank you'
- v promoting and encouraging participation in the formal and informal consultation forums adopted by the Society

5 Take responsibility for your own decisions and actions and for your team, by:

- i making decisions, including hard decisions, within one's authority level, and accepting accountability for them
- ii taking personal responsibility for one's own work and that of one's team, including when something goes wrong or doesn't work out, and saying 'sorry' when appropriate
- iii recognising that taking reasonable risks is an essential part of learning and development
- iv working to ensure that individuals are not 'set up to fail', e.g. through:
  - ensuring individuals and teams have the resources to do the job
  - ensuring individuals have the skills or have access to the training and development required to do the job
  - ensuring they have access to the people they need to involve
- v ensuring that individuals receive personal as well as professional support when required, e.g. through supervision, stress management interventions, opportunities to socialise informally as well as meeting professionally, and appropriate implementation of 'family friendly' policies and procedures, such as carer's and compassionate leave

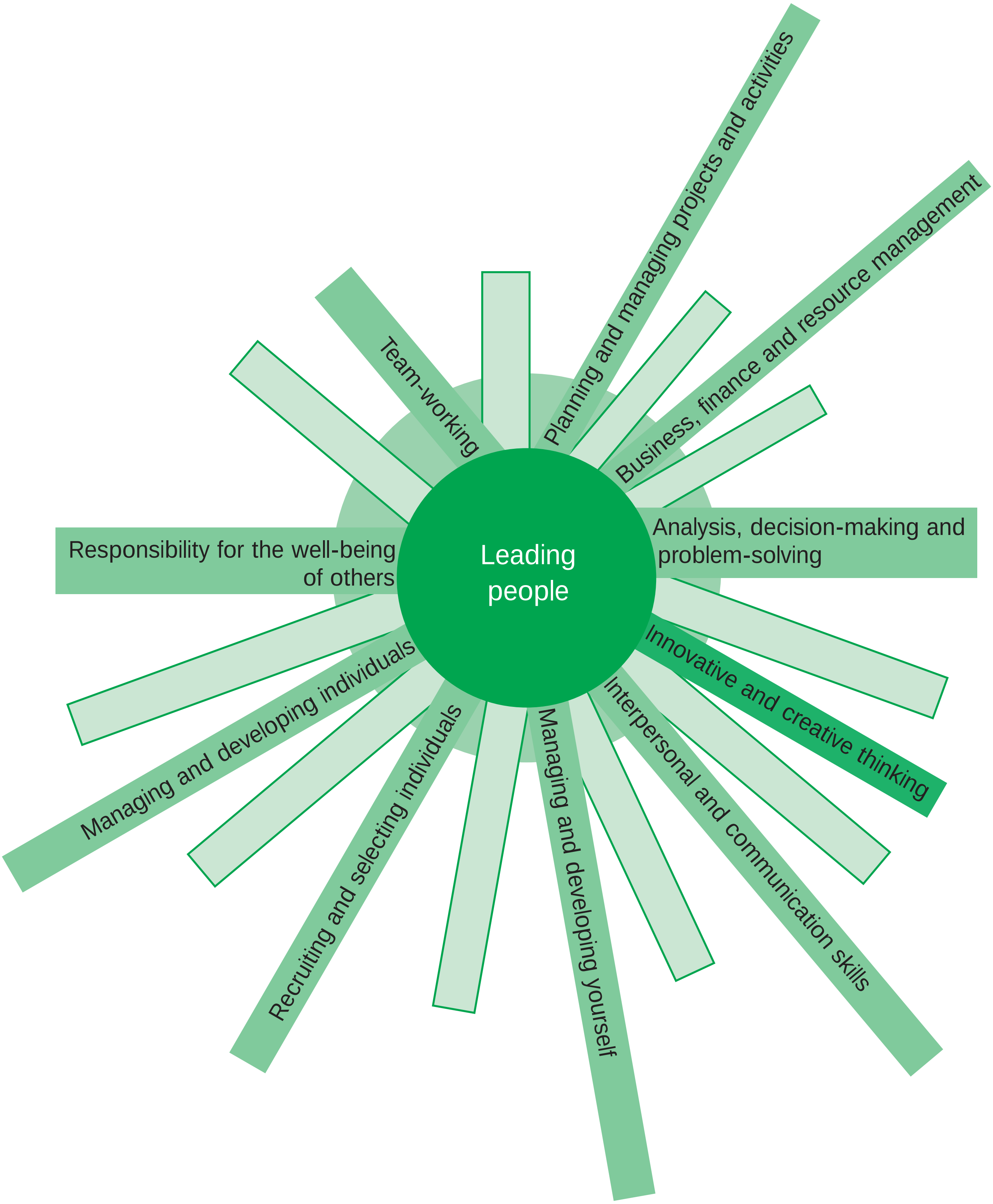
6 Demonstrate flexibility and open-mindedness, by:

- i actively seeking and demonstrating a willingness to listen to all ideas, whoever they come from, while also listening to and supporting those who feel threatened by them
- ii encouraging and supporting others to develop new approaches which improve ways of working, achieve better outcomes, and/or improve working relationships within a team or with others (e.g. partners or clients), and demonstrating a willingness to implement good ideas
- iii welcoming and/or initiating change which will help to ensure that the Society becomes and remains more relevant to local and global crisis needs and expectations, and actively promoting flexibility and adaptability to others
- iv being willing to adopt flexible working arrangements to accommodate the needs or preferences of individuals, and working to accommodate individuals with a disability or special needs, in accordance with the requirements of relevant British Red Cross policies and procedures

7 Support and share, by:

- i being responsive, approachable and supportive of colleagues
- ii contributing actively to teamwork, developing and encouraging good working relationships
- iii providing honest, constructive and timely feedback to others
- iv seeking feedback from others on all aspects of behaviour and work practices
- v sharing information as widely and openly as possible, and inviting others to contribute towards or share in decision-making

Appendix 3
The British Red Cross management competencies



Appendix 3
The British Red Cross management competencies

1 Leading people:
Motivating, directing and supporting others towards achieving the Society's vision, mission and strategic objectives

i Establishes and communicates a shared commitment to the British Red Cross, the Fundamental Principles, and the Society's vision and mission and strategic objectives

ii Works towards a clearly defined vision of the future, setting out a way ahead, establishing and communicating high expectations, setting standards, clarifying tasks and priorities, and defining accountabilities, and ensuring that the Society's policies and procedures are implemented

iii Motivated by challenge and achievements, responding positively to change, and coping positively and constructively with opposition or criticism

iv Understands others, exploring what motivates them, and inspiring and stimulating them through an optimistic 'can do' attitude

v Acts as a role model, and identifies other positive role models

vi Recognises own contribution and impact on others, and respects and values the contribution and achievements of others

2 Planning and managing projects and activities:
Ensuring that work carried out achieves the Society's and the team's objectives

i Ensures that projects, tasks and activities contribute towards achieving the Society's vision, mission and strategic objectives

ii Able to initiate, launch and establish projects, managing them from the initial set-up and briefing through to successful completion, whilst also able and willing to change direction when required, e.g. if the Society's priorities change

iii Understands different methods of project planning and uses the most appropriate project planning tools to achieve a positive outcome

iv Breaks projects down into manageable, achievable and measurable goals, tasks and activities, allocates these equitably and realistically, and establishes appropriate methods of management and control and clear lines of authority and accountability

v Understands the importance of monitoring, measurement, evaluation and reporting; defines appropriate performance indicators and success criteria for projects and individual tasks; implements financial controls to ensure that projects and activities are completed within budget, and monitors and reviews progress

vi Accepts and develops other people's ideas to improve performance, continually striving to identify and minimise barriers to excellence and taking personal action to ensure the quality and accuracy of work done

3 Business, finance and resource management: The capacity to make best use of financial and other resources

i Able to prepare and pursue a strategic approach and to maximise opportunities, balancing short term needs and long term strategy

ii Implements British Red Cross business planning processes in accordance with British Red Cross policy and procedures to achieve corporate and divisional objectives, working within agreed frameworks, but challenging them when they are not in the interests of the Society and its business

iii Understands and uses an appropriate range of financial indicators

iv Costs activities and projects, sets budgets, monitors expenditure against budgets, implements effective management controls to correct variances, and achieves business and financial targets

v Allocates financial and other resources appropriately, ensuring that individuals, teams and activities obtain the necessary resources, making valid judgements of priorities, and providing for contingencies

vi Places value on effective deployment of resources in the interests of the Society, managing physical assets and resources carefully, implementing relevant policies and procedures, and taking actions on matters such as security, maintenance and availability of resources

4 Analysis, decision-making and problem-solving: Analysing, interpreting and managing information and using it to make well-judged and timely decisions; recognising problems and developing effective solutions

i Endeavours to ensure that all decisions promote, and are in keeping with, the Fundamental Principles and the Society's vision, mission, and strategic objectives

ii Able to research, analyse, manage and manipulate information from a variety of sources; to evaluate criteria and recognise constraints; to devise and evaluate options; to make sound judgements and decisions, and develop effective solutions

iii Considers the outcomes, benefits, risks and wider implications, including impact on the performance and perceptions of the Society, before making decisions or taking action

iv Able to make use of, and reconcile, a variety of perspectives when making sense of a situation

v Consults as widely as necessary to ensure decisions are appropriate and realistic, and to obtain 'buy-in' from others

vi Recognises levels of responsibility and, where necessary, clarifies the degree of autonomy in decision-making, and then works within these, checking with higher authority when required and ensuring that decisions do not go by default

5 Innovative and creative thinking: The ability to identify opportunities and take action to bring about improvements

i Does not automatically accept the status quo

ii Considers creativity and innovation to be an important aspect of the manager's role, and values and rewards innovation and creativity in others

iii Actively seeks improvements to ways of working and, when appropriate, takes the initiative in adopting new and more effective approaches and procedures, and/or in recommending them to others

iv Identifies patterns and meaning from disparate pieces of information which are not obviously related

v Produces creative but practical ideas, and generates new solutions to problems, taking reasonable and justifiable risks in implementing new ideas and solutions

6 Interpersonal and communication skills: Building and maintaining relationships internally and externally

- i Takes the initiative in communicating with others ('up', 'down' and 'sideways'), using all available methods appropriately
- ii Provides clear and accurate information on policy, strategy, tasks and procedures to individuals and teams
- iii Communicates effectively with relevant internal and external stakeholders, e.g. volunteers, clients, partners, donors, etc, representing the Society positively and realistically, and managing contacts with the range of stakeholders and others appropriately
- iv Expresses opinions clearly and persuasively, using information and arguments in appropriate ways, and selecting communication styles, methods and techniques appropriate to the issues, audience and context
- v Listens actively, asking questions, clarifying points and re-phrasing others' statements, in order to check mutual understanding, and then acting as appropriate
- vi Able to relate to, communicate and negotiate effectively with a wide range of people, consulting with others and encouraging frank and open exchange of views to achieve optimum outcomes

7 Managing and developing yourself: Managing your workload and ensuring your own personal and professional development, in order to maximise your contribution to the work of the Society

- i Manages own workload, prioritising tasks and activities to achieve the best outcomes for the Society
- ii Recognises the importance of continuous learning and professional development, and takes responsibility for her/his own professional and personal development
- iii Seeks feedback from others to identify own strengths and development needs, and uses this to make realistic assessments of training and development needs
- iv Able to select appropriate development activities to meet identified needs
- v Takes appropriate risks, while taking responsibility when things go wrong and learning from mistakes
- vi Able to learn and to acquire new skills rapidly, and to transfer learning from one situation to another

8 Recruiting and selecting individuals: The ability to recruit and select the 'best person' for a job/role, or to carry out a task or activity

- i Understands the line manager's responsibility for recruitment and selection, and the support available from human resources specialists
- ii Understands and ensures the application of relevant legislation, including anti-discrimination legislation, in recruitment and selection and promotion of individuals
- iii Understands and implements British Red Cross recruitment and selection policy and procedures and other relevant policies and procedures
- iv Ensures that selection criteria are fair, are based solely on the ability to do the job, and are applied objectively, so that the 'best person for the job' is selected
- v Ensures that only objective criteria are used, and that these are applied equitably and fairly, when making decisions about which individuals will carry out particular tasks, join or lead project teams, take on additional responsibilities, or undertake training and development activities
- vi Recognises the need to develop and update knowledge of recruitment and selection issues, including relevant legislation, and undertakes training if/when required

9 Managing and developing individuals: Implementing relevant British Red Cross policies and procedures, and helping others to grow to their full potential and maximise their contribution to the work of the Society

i Implements the management framework in accordance with the 'Good Practice Guide for British Red Cross Managers'

ii Allocates the projects and activities identified within the business planning process to individuals and teams, and manages and supports individuals as they carry out their tasks, ensuring that all work is carried out to the required standard and contributes towards the Society's objectives

iii Monitors and reviews performance through regular one-to-one supervision and appraisal meetings, in accordance with British Red Cross policies and procedures

iv Willing and able to address poor performance and unacceptable conduct or behaviour effectively, and in accordance with the Society's policies and procedures

v Creates an environment where learning can take place and is valued; ensures that individuals receive recognition and reward for innovation, learning and achievement, and promotes professional and personal development as key to developing a learning organisation

vi Recognises the responsibility of managers to encourage, support, and enable others (volunteers/staff who report to her/him, but also peers and other colleagues) to develop themselves, while also encouraging individuals to take responsibility for their own professional development, including their longer term career and/or personal development

vii Provides training and coaching when required, and identifies other training and development opportunities for individuals to develop skills and knowledge, taking appropriate risks when delegating work, tolerating understandable mistakes, supporting others to learn from these, and accepting responsibility if problems arise

10 Responsibility for the well-being of others: Ensuring that the Society's legal and other responsibilities for staff, volunteers and delegates are carried out effectively

i Understands the responsibilities, legal and otherwise, of the Society and its managers to ensure the well-being of its personnel, for example in relation to health, stress, working hours, safety, equality of opportunity and access, etc

ii Has appropriate knowledge of relevant legislation, and of British Red Cross policies and procedures, undertaking additional training and development to improve knowledge and understanding when required

iii Keeps abreast of new developments, e.g. new legislation and codes of practice, and new British Red Cross policies and procedures, and ensures that new requirements are implemented rapidly and effectively

iv Ensures that the people s/he manages receive appropriate training in areas relating to their health and well-being, e.g. through participation in health and safety, stress management, manual handling and anti-discrimination courses

v Implements British Red Cross policies and procedures in such areas as health and safety, equal opportunities, harassment, grievance, etc, with appropriate rigour, ensuring that individuals are aware of their rights and feel able to report incidents, that incidents are properly recorded, and that appropriate action is taken

vi Uses British Red Cross risk assessment policy and procedures to assess physical and other risks; takes action to minimise risk and/or contain it within acceptable levels, and ensures that personnel who work in situations characterised by high risk and/or security threats are informed and/or inform themselves about the situation, and take appropriate safety and security measures

11 Team-working:
Getting the best out of individuals through a team-working approach

i Understands the value of involving and consulting with others in order to ensure the best possible decisions, and the team's shared commitment to those decisions

ii Encourages a team approach, devotes time and effort to team activities, and creates opportunities to interact and to involve others

iii Shares knowledge, skills and information as widely as possible within the team in order to benefit the team and the Society, and builds appropriate relationships and partnerships with other teams and individuals, both within the Society and in the wider community, actively encouraging the exchange of knowledge and information

iv Recognises the benefits of diversity within a team, using a variety of skills and techniques to identify strengths, expertise and competencies, and individual styles, in order to maximise their impact and their contribution to the work of the team

v Uses power and authority in a fair, equitable and appropriate manner, showing respect for others' views, and sensitivity to their needs and feelings

vi Invites and encourages others within a team to take on leadership roles and to contribute to planning and organising work

Appendix 4

Individual work plan

(Created annually for each individual when the operating plan has been agreed, and then reviewed in one-to-one supervision)

Name:	Job title:	Line Manager:
Agreed on:	Revised on:	

Key activities from the business plan	Success criteria/measures and target dates

Other key activities and projects (activities not mentioned in the business plan, e.g. activities relating to responsibilities defined in the job description, and any other activities to be carried out during the year)	Success criteria/measures and target dates

For managers only: key activities relating to management and development of individuals and the team	Success criteria/measures and target dates

Individual work plan form

(example of a partially completed work plan for a Service Manager)

(based on a hypothetical Area business plan)

(Created annually for each individual when the operating plan has been agreed, and then reviewed in one-to-one supervision)

Name:	Job title:	Line Manager:
Agreed on:	Revised on:	

Key activities from the business plan	Success criteria/measures and target dates
1 Complete the needs assessment in Moorham district, using BRCS needs assessment framework • Identify potential partners for new service • Develop project plan (including funding, monitoring and evaluation) • Recruit project co-ordinator • Provide appropriate support to co-ordinator to enable project to be established	Identify min. 1 new service to meet identified need, by 1 Mar Report & recommendations by 1 May By 1 June By 1 Sept New service being delivered in areas of greatest need, to required standard, by end of year and ongoing
2 With ACSM, Medical Loan, review medical loan service against identified needs and standards throughout Branch • Develop project plan with /for ACSM to implement recommendations	Report and recommendations by 1 August By 1 October
3 Etc.	

Other key activities and projects (activities not mentioned in the business plan, e.g. activities relating to responsibilities defined in the job description, and any other activities to be carried out during the year)	Sucess criteria/measures and target dates
1 Monitor service delivery budgets to identify potential savings; improve efficiency re existing service budgets	Up-to-date financial info — ongoing; 2% reduction in costs for established services by 1 July, additional 3% by end year
2 Review existing partnership agreements and contracts	Each review completed three months prior to end of agreement or contract(list actual completion dates)
3 With RTMV and ACSMs, review, develop and ensure implementation of induction procedures for new volunteers	Ongoing; all new volunteers go through induction procedures within three months of joining, by 1 July
4 Etc.	

For managers only: key activities relating to management and development of individuals and the team	Success criteria/measures and target dates
1 Complete induction programme with new project co-ordinator	Completed when three months in post (1 Dec)
2 Implement supervision for all staff (min. six-weekly)	Initiate by Feb; ongoing
3 Through supervision, ensure ACSMs supervise all their staff (four-weekly for those involved in service delivery, six-weekly for others). Measure staff satisfaction via questionnaire.	Initiate by Apr; ongoing. Evaluation by 1 October
4 Deliver appraisals, according to guidelines, and ensure ACSMs do likewise	All appraisals completed on schedule
5 Etc.	

Appendix 4

Appendix 5
British Red Cross training and development menu

The following table summarises many of the training and development activities which may be available to British Red Cross managers and staff. It is provided to assist managers and staff to identify the most appropriate ways of meeting their training and development needs, whether for effective performance in their current role, or for longer term professional and personal development. Managers and staff should, after appropriate discussion of their training and development needs and the learning outcomes required, use this 'menu' to develop the training and development plan (agreed in supervision once the annual work plan has been agreed) and the career and personal development plan(agreed during the annual appraisal meeting). Both plans should then be reviewed, as required, during supervision.

Some of the activities listed below are new to the Society or 'under development'. At the time of writing, the support and assistance available from the Staff and Management Development Team (SMDT) may be limited, but this should improve as guidance and/or materials are developed.

Refer also to the British Red Cross staff development policy.

Development Activity	Description	Additional Information/Comments
Learning from others		
Coaching	One individual facilitates the learning/development of another through listening, questioning, helping to clarify objectives, proving feedback, etc. The coach may be the line manager, an experienced colleague or technical specialist.	NVQ Unit C25 (Coaching Award) is available through the British Red Cross. The MDT hopes to develop guidance and training on coaching. In the meantime, advice is available from the SMDT.
Mentoring	A confidential one-to-one relationship with a more experienced person outside the line management structure who can guide and help the individual to develop her/himself.	The SMDT hopes to develop guidance and training for mentors and mentees. In the meantime, advice is available from the SMDT.
Shadowing	Shadowing involves moving an individual away from their normal role to work alongside another person in a different role and environment.	The British Red Cross intends to develop shadowing as a method of developing managers and staff. In the meantime, advice is available from the SMDT.

Development Activity	Description	Additional Information/Comments
Job swaps	Job swapping involves two people exchanging roles for a very limited period, often just one day.	Advice available from the SMDT.
Role models	The individual learns by observing another more experienced person and modelling their own approach/way of working on this. Managers may be able to suggest appropriate role models.	Only as good as the person one chooses! The trick is to identify the 'right' role model.
Supervision	The regular, four to six weekly review of progress, with constructive feedback from the manager, together with objective setting for the next few weeks, is itself one of the most important tools for learning and development. (Developing the training and development plan and ongoing discussion of development issues should also ensure that other training and development needs are met.)	Refer to the supervision policy and guidance. Advice and guidance is available from the SMDT.
Appraisal	The annual appraisal meeting provides a valuable opportunity for constructive feedback on performance and achievements, together with objective setting and, like supervision is a valuable tool for learning. 360° appraisal is designed to enhance the opportunity for learning, since the individual then also receives constructive feedback from colleagues and, for managers, also from staff (direct reports). (The training and development discussion, creating the career and personal development plan and reviewing the training and development plan, will help ensure that identified development needs can be met)	Refer to the British Red Cross staff appraisal scheme. Advice and guidance is available from the SMDT, and human resources staff
Learning by doing		
Delegated tasks	Managers can develop their staff through carefully planned and monitored delegation of appropriate tasks and activities. Given clear objectives and guidance or advice on completing a new task and an appropriate level of supervision, individuals learn by doing real tasks. Detailed review and constructive feedback from the manager will help ensure that learning takes place.	One of the most effective ways of learning, but managers must ensure staff have the support they require as they develop new skills. May be linked to other training and development activities, e.g. coaching, taught courses. Advice is available from the SMDT.

Development Activity	Description	Additional Information/Comments
Individual projects	As for 'delegated tasks' above, individuals learn by taking on responsibility for a project. (See also 'working groups, project teams and task forces' below.)	Important to ensure that objectives are clear, support is available, and the project is reviewed. Advice is available from the SMDT.
Job rotation	Job rotation involves individuals 'swapping' their jobs or some of their tasks and responsibilities for an agreed period. Individuals develop their knowledge and skills by working on tasks normally carried out by the other person. Guidance and support is provided by the person whose work it normally is, and by their own and each other's managers. Individuals can learn and develop by carrying out a similar role to their own in a diferent place, e.g. another department or a different Branch/Region.	Requires both managers' approval, and may be difficult to organise. Must also be carefully managed. Some people may be so concerned about their normal work that they cannot 'let go', others may get so involved in their new work that they are that they are unwilling to give information and support to the other person. Advice is available from the SMDT and human resources staff.
Secondment	An individual moves into another position for an agreed period, e.g. to replace a post-holder who is on extended leave, to fill a post which is, by its nature, temporary, or to support a team which is currently over-stretched. Whatever the reason, secondment provides the opportunity to learn new skills and procedures and to work in a different environment. Appropriate support is essential. Secondments are advertised in the vacancy bulletin in the usual way.	Secondment may lead to longer term career progression, so managers must ensure that selection for secondments is carried out against fair and equitable criteria. The individual will require an induction into the new post, and may require a re-induction on their return to their own post. Advice is from Territory Human Resources Managers and UK Personnel Unit.
'Acting up'	Similar to secondment, but 'acting-up' normally refers to a temporary move into a more senior position (often that of the individual's own line manager) to fill a temporary vacancy. These posts often need to be filled at very short notice, and may therefore only be advertised to a very restricted group, e.g. the absent manager's direct reports.	Because of the longer term implications of 'acting up' the selection process must be fair. It is good practice to make this process as rigorous as the recruitment and selection for a permanent, or any other short term post. Advice is available from Territory Human Resources Managers and UK Personnel Unit.

Development Activity	Description	Additional Information/Comments
Learning in groups		
Working groups project teams & task teams	Individuals should be appointed to project teams, working groups, etc, because of the contribution they can make to the work of the group, e.g. the specialist knowledge and experience they bring, rather than to meet their own learning and development needs. However, people can learn a great deal from participating in such groups, especially if their line manager reviews learning with them and provides opportunities to transfer the learning to other tasks.	The learning outcomes of participating in a project team can legitimately influence the selection of an individual if they will be learning things which they also need for their existing role. Otherwise selection should be on the basis of what they can contribute (and, of course, availability). Advice is available from the SMDT.
Action learning sets	A group of people who have similar or equivalent roles arrange a series of meetings. With the help of a skilled facilitator, they explore work-related issues, identify options and decide what action to take. Individuals also benefit from mutual support and constructive feedback.	The British Red Cross is hoping to develop more action learning sets. Information and advice is available from the SMDT.
Networking	Informal networks of individuals with similar or related roles, or facing similar issues or problems, provide personal support and can contribute significantly to learning and development through sharing experience and learning from each other. Networks may be internal, or involve people in other organisations.	Many networks are informal, with the individual choosing their own support groups. Managers can help to identify people who could provide support and share experience. Managers also have a role in ensuring that individuals are not excluded from networks, e.g. for reasons of culture, gender, sexuality or responsibilities as a carer.

Development Activity	Description	Additional Information/Comments
British Red Cross taught courses		
British Red Cross taught courses	British Red Cross staff and managers can attend a variety of taught courses, which have been developed to meet identified training needs within the organisation. Most are delivered at OK Office and in the Territories and Areas The decision to attend one of these internal courses should always follow discussion about training and development needs during supervision or appraisal. Action-planning and appropriate follow-up with the manager helps to ensure that course learning is transferred into the workplace.	The Staff Development Team at UK Office issues an annual Staff and Management Development Brochure. The Staff and Management Development Team, SMDT, and other training and development specialists can provide information and advice.
British Red Cross management courses/programmes		
Developing Management Skills	This is a three-day residential training programme for British Red Cross staff who have recently moved into their first managerial role, staff who have the potential to take on such a role, and more experienced managers who have not received any management training.	Further information from the Staff Development Team in the first instance, or from the SMDT.
Management course for senior managers	The Society is developing a management training programme specifically for Business Unit Heads and other senior managers. A taught course will be one element of this programme.	Programme development and piloting takes place in 2000, with the programme being implemented in 2001.
Management course for volunteers who manage others	The British Red Cross also intends to develop a management training programme for British Red Cross volunteers who take on management roles. This will be tailored specifically for volunteer managers' needs and, in order to ensure that volunteers can access the programme, will probably have a flexible modular structure.	No further information available at the time of writing.

Development Activity	Description	Additional Information/Comments
Management courses for overseas delegates	The British Red Cross also provides management training for overseas delegates taking on management responsibilities.	Information from the International Personnel Unit.
External taught courses		
Specialist short courses	Where specific training and development needs have been identified during supervision and/or appraisal, and these needs cannot be met through internal British Red Cross programmes, the Society may agree to send individuals on courses run by external training providers and fund their participation.	The Staff and Management Development Team at UK Office and other training and development specialists can advise on external courses. Clearly it is important to check that the course will meet the identified training and development needs. Some of these courses are very costly – managers must take the budget implications into account.
Workshops and conferences	Similar to external specialist courses. The Society may be able to support participation in various conferences and workshops, providing they are appropriate for identified training and development needs. The British Red Cross will not fund seminars, etc, whose main purpose is networking.	Advice and information from the Staff and Management Development Team at UK Office and other training and development specialists.
External study programmes		
External study programmes	The British Red Cross has very limited resources to support individuals undertaking study programmes leading to a recognised qualification. The Society can only contribute towards the cost if certain criteria are met.	Advice and information from the Staff and Management Development Team at UK Office. The Society is developing a policy, including a set of criteria, on external study programmes.

Training and development plan form

(Training and development required for effective performance in existing role/for activities identified in the current work plan)

Name: Job title: Line manager:

Agreed on: Revised on:

Desired outcomes of training and development to meet the needs identified in work plan discussion, supervision or appraisal	Training courses/ development activities to achieve desired outcome	Action	Others involved	Completion date	Completed

Appendix 6

Example of completed training and development plan

(for a relatively new Services manager)

(Training and development required for effective performance in existing role/for activities identified in the current work plan)

Name: Subhi Abu Ishira | Job title: Services Manager | Line manager: Betty Jones (Operations Director)

Agreed on: 19/11/2000 | Revised on:

Desired outcomes of training and development to meet the needs identified in work plan discussion, supervision or appraisal	Training courses/ development activities to achieve desired outcome	Action	Others involved	Completion date	Completed
Develop understanding of the Red Cross, the Fundamental principles and anti-discriminatory practice (Behaviours 1 & 3)	Build on Red Cross World Induction Course by attending an Ideals in Action Course	Subhi	TDA	Dec 2004	
	Attend Managing Diversity (anti-discrimination training) Course	Subhi	TDA	April 2005	
Develop understanding of management and service delivery in the voluntary sector (Behaviour 2)	Attend the voluntary sector management course run by local CVS	Subhi		Feb 2005	
	Shadow Anne Lane (SM in neighbouring branch) Three days by agreement	Betty to arrange	Anne Lane	Jan 2005	
	Ongoing coaching and supervision from Betty	Subhi	Betty	Ongoing	
Project planning and management (specifically relating to identifying needs in the local community)	Coaching on project management by Betty (include in regular supervision meeting)	Subhi	Betty	Ongoing (to May 2005)	
	Shadow Anne Lane (see above) and some coaching from Anne	Betty to arrange	Anne Lane	Jan 2005	
Develop knowledge of relevant British Red Cross policies and procedures (Competency 10)	Study employee handbook and APEL policy (follow up in supervision to ensure understanding)	Subhi	Betty	Jan 2005	
	Attend British Red Cross Health and Safety Course	Subhi	TDA	Mar 2005	
	Coaching on risk assessment in service provision from Judy (SSM) has specialist knowledge	Subhi	Subhi	June 2005	

Appendix 7

Career and personal development plan

(Training and development activities for longer term career/professional development/to enhance existing job/personal development)

Name: Line manager:

Current job title: Future job(s) identified for career progression (if relevant):

Date agreed: Date revised:

Desired outcomes of training and development for career/personal development (identified in appraisal)	Training courses/development activities to develop competencies	Action	Others involved	Completion date	Completed

Example of a completed career and personal development plan

(for an experienced Services Manager)

(Training and development activities for longer-term career/professional development/to enhance existing job/ personal development)

Name: Rita Oswald

Line manager: Dave Rickard (Operations Director)

Current job title: SM

Future job(s) identified for career progression (if relevant): Operations Director – in about 18 months time (?)

(Rita to explore whether there might be other possibilities with the regional Human Resources Manager)

Date agreed: 9/9/2000

Date revised:

Desired outcomes of training and development for career/personal development (identified in appraisal)	Training courses/development activities to develop competencies	Action	Others involved	Completion date	Completed
Greater understanding of Area Director's job/role	Shadow an experienced OperationsDirector (good role model)	Dave to identify and arrange	Selected OD	c. 9 months	
	(Ditto for any other possible pathway identified with RHRM)				
Business and financial planning (Competency 3)	Coaching from Dave	Rita/Dave		June-Dec 2003	
	Attend Finance for Non-Financial Managers course	Rita	TDSM	May 2003	
	Develop Branch Business Plan for 2002 (with Dave's assistance as required)	Rita/Dave	ROPM	June-Dec 2003	
Recruiting and selecting individuals (Competency 8)	Attend British Red Cross Recruitment & Selection course	Rita	TDSM		
	Take responsibility for job design and the whole recruitment process for the proposed Young Carers Project Manager	Rita	Dave	April 2003 June 2003	
Innovative and creative thinking (Competency 5 – esp. iii & v)	Coaching from Dave & practical exercises relating to live issues in the Area	Rita	Dave		
	Shadowing/role model	Rita	To be identified	Dec 2003	
	Rita to identify/consider other ways of achieving this competency & overcoming her 'fear of taking risks' (when it would be appropriate)	Rita		Dec 2003 Discuss again in January 2003	