**Induction Guidance for Line Managers and Induction Facilitator/Buddy**

The purpose of this Workplace Induction is to make the new staff member’s transition into their

new role as smooth as possible. Your role in this process will be to ensure that all relevant pre-arrival actions are implemented before the new employee’s start date and that all information contained

in the enclosed Check List is communicated accurately to ensure consistency of delivery across all employee inductions.

It is anticipated that locally tailored induction activities will also be undertaken to supplement these requirements to ensure the new staff member receives a comprehensive induction.

Please ensure you are familiar with the information contained in the University web links before discussing with the new employee. Please also ensure new employees are aware that their team is there to support their transition, so they can call on any of their colleagues to assist them as and when needed.

It is expected that the Line Manager will be responsible for ensuring that the Induction Facilitator/Buddy has carried out their activities on the checklist. Where there is no Induction Facilitator the Line Manager is responsible for ensuring all areas of the check list are completed.

University staff transferring from other parts of the University or return to work after a period of absence should receive an induction as an aid-memoire, for updating on any changes after a period of absence or advising of localised service-specific actions for staff moving into new roles.

**Pre-arrival:** before the new member of staff arrives there will be planning to do to ensure the induction runs smoothly.

**Day One**: Try not to “bombard” new staff with too much new information on the first day. However there will be essential points to cover.

**First Week:** The induction facilitator needs to ensure that the induction programme is running smoothly.

**First Month:** The new starter should be settled into their new role with a clear understanding of how their team and unit/Service function. They should have met all the staff that they will be regularly working with and identified key priorities.

**After Three Months:** The induction facilitator should meet the new member of staff to review the induction programme, sort out any outstanding items.

**At the end** of the induction period the Induction Facilitator will need to ensure they complete the Induction Evaluation form to feedback on their Induction experience, so that the process can be continually monitored and improved where necessary.

**Employee Name:** Click here to enter text.**Job Title:** Click here to enter text. **Ext No:** Click here to enter text.

|  |  |  |  |
| --- | --- | --- | --- |
| **Staff involved in your Induction** | **Name** | **Job Title** | **Ext. No.** |
| **Induction Facilitator (IF)** |  |  |  |
| **Line Manager (LM)** |  |  |  |
| Click here to enter text. |  |  |  |

**Pre Arrival Information**

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| ACTIONS | NOTES | Line Manager/Team Leader | IF/Buddy  (Tick when completed) |
| LM to Contact IF to advise of new staff member, start date, time of arrival etc. and arrange a date for IF to meet with new staff member. |  |  |  |
| LM to write or call new staff member to inform of start date, time of arrival, the name of the member of staff meeting them with contact telephone number, location of meeting place, nearest car park. |  |  |  |
| Work Space –Line Managers will need to identify workspace and requirements. If new furniture is required this can take up to 8 weeks. Order PC/Laptop if required – allow time for delivery. |  |  |  |
| PC Set up and IT Induction – Raise a call through SID to arrange 1) reimage existing equipment or set up new equipment for a new user. 2) arrange IT Induction for the day that they start so they can start to use their PC and printers on their first day. |  |  |  |
| Telephone – New telephones and telephone numbers can be purchased through SID, please allow 2 weeks for handsets to be delivered. Changes to telephone details can also be requested through SID. |  |  |  |
| Keys – If keys are required, order through the Campus Services Help-Desk website – using appropriate form |  |  |  |
| Complete Application Forms - For access to Aptos, SITS, Trent etc. if you can before they arrive to ensure that they have access to all systems on arrival. |  |  |  |
| Email address and username - Where IF’s are named in the starter form; IT will contact them in advance of the joining date by email. IF’s are able to log onto an account management area and access the account details of the new starter. They will be able to download a PDF document with the details immediately. The new starter can log in and change their password. |  |  |  |
| Make appointments for the new employee to meet key people in the College/Professional Service e.g. those with whom they will need to liaise in relation to the duties of their post. |  |  |  |
| Inform staff in section about new employee, confirm role and responsibilities. |  |  |  |

**Welcome and Introduction**

**(Colleagues and work environment)**

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| ACTIONS | NOTES | Line Manager/Team Leader | IF/Buddy  (Tick when completed) |
| Confirm IF/LM role in the induction process – Meet new member of staff and explain your role in the induction process. Describe why there may be more than one person involved. Arrive in advance of the new starter and let them know how you will be supporting them to settle in. Give a brief overview of the format. |  | Day 1 |  |
| Welcome to College/Professional Service and organisational chart. For non-office based staff, ensure that a computer is made available to view the Services web pages and organisation charts. |  |  | Day 1 Day 1 Day 1 |
| Introduction to colleagues, Head of Service and other key personnel (Copy of Organisational Chart) |  |  | Day 1 |
| Place(s) of work, address, keys and access, Bags, purses/personal belongings. |  | Day 1 | Day 1 |
| Start and Finish Times and timing of lunch breaks |  | Day 1 | Day 1 |
| Assistance with access or other special requirements – Refer on any requirements to LM. |  | Day 1 | Day 1 |
| Tour of building (To include location of toilets/tea/coffee/eating facilities/smoking/location of recycling and waste disposal facilities) |  | Day 1 | Day 1 |
| Fire exits - Show fire evacuation route (exits and assembly points), Show where fire extinguishers etc. are located. How to raise the alarm, when is the fire alarm test day? |  |  | Day 1 |
| Explain First Aid procedures - Identify how to contact a first aider in the building, who to contact in emergency, what to do relevant to substances. |  |  | Day 1 |
| IT Account Creation – New Starter log in/change password |  |  | Day 1 |
| Annual holiday Entitlement – including Bank holiday, special leave and process for permission to book leave |  |  | Day 1 |
| How and when you are paid – Show Trent Self Service – explain how to book Annual Leave, Book on Training Courses and training record, Update Personal Information. |  |  | Day 1 |
| Sickness Absence Code of Practice – Explain arrangements for reporting absence from work. |  | Day 1 | Day 1 |
| Probation Requirements – Explain the procedure and arrange a date to meet for mid probation. |  | Week1 |  |
| Security Services – General enquiries/reporting |  |  | Day 1 |
| Explanation of the Performance Development Review process (PDR) |  | Week1 | Week1 |
| Relocation information (if applicable) |  | Week1 | Week1 |
| Travel - Car parking, permits, travel loan and discounted tickets information – Show location of car parking office if they need to collect a permit. Purchase of car and bicycle through salary scheme. Car Sharing scheme and car parking spaces. Stagecoach Bus Service D (Exeter) U/88 (Cornwall). Location of showers and cycle parking. |  |  | Day 1 |
| Campus maps and directions – Print off a campus map for the new member of staff to keep with them. |  |  | Day 1 |
| University Minibus service for Streatham Campus <> St David’s Station and St Luke’s Campus. |  |  | Day 1 |

**Documentation**

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| ACTIONS | NOTES | Line Manager/Team Leader | IF/Buddy  (Tick when completed) |
| Personnel and payroll documentation – P45/P46, Contract, PD18 Salary payment details, Medical questionnaire, ID Check – All new employees, irrespective of their nationality must provide evidence to show that they have a right to work in the UK (under the Immigration, Asylum and Nationality Act).  Please check webpage for list of documents that can be provided <http://www.exeter.ac.uk/staff/employment/righttowork/proof/how/>  This also applies to staff who have limited leave to remain in the UK.  Documents should be taken to:  Exeter: Employee Services Room 357a (third floor) Northcote House.  Cornwall: ASU Reception in the Peter Lanyon Building.  All Medical School staff: use web link and arrange to take documents to one of the contacts listed in Exeter or Cornwall.  If staff member is an International staff member – sign post to International Staff web page |  |  | Day 1 |
| University ID card (Obtain from the University Reception) – Once new employee has signed and returned their employment contract, their details will be registered on Trent. To obtain their staff ID card they will need to be taken to the main University Reception to have their photograph taken and their ID card will be processed while waiting if they have not provided their name, date of birth and Photo beforehand. |  |  | Week1 Week1 |
| IT user registration – If you are a new salaried member of University staff your IT Account will be automatically created once you have a valid employee record and the account details will be with your induction facilitator for collection. |  |  | Day 1 |
| Membership of Pension Scheme – New members of staff will be automatically signed up to the scheme and will need to “opt out” if they do not wish to be a member. |  |  | Week1 |
| Complete Application Forms - For access to Aptos, SITS, Parabilis, Trent etc. |  | Week1 |  |
| Staff Association – New members of staff will need to “opt in” to be a member – form on the web to be completed and sent. And show site and discounts available. |  |  | Week1 |
| Above and Beyond – Explain the process and register. |  |  | Week1 |

**Learning and Development**

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| ACTIONS | NOTES | Line Manager/Team Leader | IF/Buddy  (Tick when completed) |
| Health & Safety Induction – Online or face to face |  |  |  |
| Equality & Diversity Induction – online or face to face |  |  |  |
| University Induction |  |  |  |
| Where the employee manages others, ensure the new employee undertakes compulsory Recruitment and Selection training. |  |  |  |
| Where the employee manages others, ensure the new employee undertakes compulsory Performance Development Review training |  |  |  |
| Other Mandatory Training relevant to job role and College/ Professional Service requirements: i.e. Bribery Act |  |  |  |
| Identification – Of any further specific safety training |  |  |  |
| Identification – Of any job specific legislative courses |  |  |  |
| For Research/externally funded staff (where applicable) Discuss any requirements/conditions relayed by the funder. |  |  |  |
| For Teaching Staff (where applicable) Make the new employee aware of the requirement to undertake the PCAP |  |  |  |
| Learning and Development opportunities – Look on the web or on Trent Self-service |  |  |  |

**Health, Safety and Wellbeing**

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| ACTIONS | NOTES | Line Manager/Team Leader | IF/Buddy  (Tick when completed) |
| H & S Management Structure of safety management within the department. Responsible person in the area. Any health and safety groups/committees Lead for safety in the College/Professional Service |  |  |  |
| COSHH Explain the substances that are in the work area |  |  |  |
| Risk assessments relating to Work area and tasks and Building – explain specific to department. |  |  |  |
| Describe LEV / fume hoods and how to check / how to use |  |  |  |
| Explain spillage / Explain emergency procedures in place |  |  |  |
| Manual Handling Any manual handling risks and appropriate devices / aids to use with tasks? |  |  |  |  |  |
| Display Screen Equipment Explain the DSE self-assessment process and give access to form to complete and explain Eye Test Procedure in place. |  |  |  |  |  |
| Health & Wellbeing Explain Care First, give Care First phone number (0800 174 319) and link to Care First website  <http://www.care-first.co.uk/care-first-lifestyle/> |  |  |  |  |  |
| Inoculation incidents Explain the emergency procedures in place for emergency inoculation incidents. Immunisation Does the post holder require immunisations to carry out this work? |  |  |  |  |  |
| Lone Working If employee will be considered a lone worker discuss the processes and equipment in place for them. Explain how to raise the alarm |  |  |  |  |  |
| Radiation Explain the procedures in place for radiation protection, the names of the local RPS and University RPO |  |  |  |  |  |
| Laser Safety Explain Laser safety rules, Laser supervisors in the area, risk assessment process, controls in place, training needs and PPE requirements |  |  |  |  |  |
| Work Equipment Electrical / mechanical/IT equipment in work area. Explain how /when to use, any safety features in place, emergency stops, pre use checks |  |  |  |  |  |
| PPE Any PPE Where to store, how to check in good working condition, how to replace /order new. |  |  |  |  |  |
| RPE Anyone required to use respiratory protective equipment ensure Face Fit has been carried out (book with Occupational Health) and RPE is available, fit for use. Checking and replacing procedures |  |  |  |  |  |
| Pregnant Workers Explain that a risk assessment will be carried out to ensure that all safety measures are in place. |  |  |  |  |  |
| Field work risk assessment and insurance process. All staff going on fieldwork / planning / supporting field work need to be aware that risk assessments are needed before the trip. Explain Risk assessment process within the College. |  |  |  |  |  |
| PEEP All staff that need to be assisted in the event of an emergency evacuation will need a Personal Emergency Evacuation Plan (PEEP) in place. Ensure building Fire Marshall is aware. |  |  |  |  |  |

**Policies and Procedures**

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| ACTIONS | NOTES | Line Manager/Team Leader | IF/Buddy  (Tick when completed) |
| Health and Safety Policy |  |  |  |
| Equality and Diversity - Dignity and Respect at Work |  |  |  |
| HR Policies and procedures |  |  |  |
| Terms and conditions of employment |  |  |  |
| Visual Identity – templates, rules of use of logo etc. |  |  |  |
| IT user registration – User Guides how to connect Mobile phones to e-mails – VPN –to access files at home |  |  |  |
| University Sustainability Policy - Explain relevant Environmental issues within the role. |  |  |  |
| Parents and Carers |  |  |  |
| Trade Union membership information |  |  |  |
| Records Management - data protection and freedom of information |  |  |  |
| Finance Policy – How to claim expenses, handling money, |  |  |  |
| Procurement Services – Sustainable Procurement Policy and Strategy |  |  |  |
| University documents and policies |  |  |  |  | **Day 1**  **IF** |

**Your Job Role and Working Environment**

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| ACTIONS | NOTES | Line Manager/Team Leader | IF/Buddy  (Tick when completed) |
| Access to photocopier – codes, use of Print Services |  |  |  |
| Useful contacts and how to find contact information.  Online lookup: - phone numbers, email |  |  |  |
| Use of telephones – etiquette on answering, Set up voice mail, Telephone User manual. |  |  |  |
| Outlook Email – signature, use of “My Exeter” , Set up out of office, Outlook Diary Management –sharing calendars, Generic Office/Service email addresses |  |  |  |
| SID – Explain Sid for IT problems/request for AV Technicians etc. |  |  |  |
| Mail arrangements / pigeon holes |  |  |  |
| Recycling and waste disposal facilities for building/work area |  |  |  |
| Campus Services Help Desk – Explain the use of the forms “Fix it” “Move it” etc. |  |  |  |
| Administration/Secretarial organisation of the Service |  |  |  |
| Outline any relevant shared resources and how to access them i.e. shared drive |  |  |  |
| College/Professional Service- specific localised induction information |  |  |  |
| Discuss role (go through job description/further particulars) and agree with Line Manager key objectives of role (record on appraisal document) within 3 months |  |  |  |
| Identify date with Line Manager of first probation review |  |  |  |

**Organisation**

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| ACTIONS | NOTES | Line Manager/Team Leader | IF/Buddy  (Tick when completed) |
| \*History of the University  (Signpost to relevant web pages) |  |  |  |
| \*Profile of the University - (Signpost to relevant web pages) |  |  |  |
| \*University Mission, Vision and Values  (Signpost to relevant web pages) |  |  |  |
| University Corporate Plan – Strategic Plan  (Signpost to relevant web pages) |  |  |  |
| \*University Management Structure - How the University Works – Governance, Council, Senate -(Signpost to relevant web pages) |  |  |  |
| Aims of your College/Professional Service University - organisational chart showing the position of  your Service and the aims of your section |  |  |  |
| University Calendar |  |  |  |

\*Will be included in Induction Event

**Communication Systems**

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| ACTIONS | NOTES | Line Manager/Team Leader | IF/Buddy  (Tick when completed) |
| Jargon Buster |  |  |  |
| Staff Notice Boards - Own Service and notice board on web |  |  |  |
| Meetings 1:1 and Team |  |  |  |
| Weekly Newsletter, Team Brief and Staff Events |  |  |  |
| Intranet College/Professional Service |  |  |  |
| Talks College/ Professional Services Director’s /Vice Chancellor |  |  |  |
| Distributions Lists i.e. intcomsec |  |  |  |

**Facilities/Useful Information**

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| --- | --- | --- | --- |
| ACTIONS | NOTES | Line Manager/Team Leader | IF/Buddy  (Tick when completed) |
| Information on shops/banks and places to eat |  |  |  |
| Virtual Tours:- Streatham, St Luke’s Campus & Cornwall Campus |  |  |  |
| Sports facilities: Exeter and Penryn |  |  |  |
| Library |  |  |  |
| Childcare |  |  |  |
| Staff Social Areas |  |  |  |
| Students Guild |  |  |  |
| University Wellbeing Map – Sculpture walk |  |  |  |
| Multi-faith Chaplaincy |  |  |  |
| Local Exeter/Cornwall Information |  |  |  |

**Induction Evaluation**

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| ACTIONS | NOTES | Line Manager/Team Leader | IF/Buddy  (Tick when completed) |
| Complete mandatory evaluation of induction form. |  |  |  |

**Three Months On**

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| --- | --- | --- | --- |
| ACTIONS | NOTES | Line Manager/Team Leader | IF/Buddy  (Tick when completed) |
| IF to meet with new employee to review induction programme and identify any outstanding items to be covered. Agree and action plan to deal with outstanding items. |  |  |  |