



Staff Induction Checklist (for new Managers)

For: New staff taking on management, supervisor and team leader roles

This checklist is to be used in addition to the generic staff induction checklist

Name of Inductee:

Line Manager:

Induction Facilitator:

Start Date:

Job Title:

Contact Details:

Contacts Details:

Onboarding Checklist

For staff in management, supervisor and team leader roles:

- This checklist list is to be completed **in addition** to the generic staff induction checklist.
- It should be completed where new members of staff are embarking on a role that has management, supervisory, team leader or staff oversight responsibilities.
- Please talk through all of the relevant areas and initial the 'Confirm Discussion' column as required (person being inducted is to initial). Please place N/A next to any areas not relevant to the work area indicating that this point has not been discussed.
- Once complete both the manager and member of staff being inducted must sign and date the form. This can be done electronically.
- Health and Safety: If you work in an environment that requires more specific safety considerations such as laboratories, workshops or use specialist equipment you must visit the [Health and Safety web pages](#) or contact the [Safety Team](#) for guidance about additional induction requirements. A note should be made on this form of any additional discussions or training completed.

Additional Induction checklists:

- The generic Academic and Research staff or Professional Services staff induction checklists must be also be completed by new joiners.
- **COVID-19 Return to Campus:** During the current period an additional induction is required if staff are returning to a campus or University of Exeter run site. Visit the [COVID-19 Working Safely](#) pages to access further information.

As a manager there are a number of areas that you should discuss in order to understand the University's approach and processes. It is suggested that you cover the following areas, some of which have mandatory elements, with your own manager as part of your onboarding:

Induction Area (incl links)	Requirement / Discussion points	Suggested lead	Confirm discussion (initial or N/A)
Managers, Supervisors and Team Leaders – key information	As a manager, supervisor or team leader you are vital to the running of the University and provide an important role model to the staff you oversee. The Managers, Supervisors and Team Leaders – key information pages provide essential information, from the beginning of the staff recruitment journey through day to day management and what to do if a member of staff is leaving your supervision. Spend some time looking through the information and then discuss any questions you have with your manager. The Human Resources team are also here to support you and answer any queries.	LM	
Discussion with and about staff members	Where possible discuss the current team in order to understand their roles, responsibilities and any wellbeing considerations. Book 1:1 sessions with each member of staff in order to find out the detail about and to get to know each person.	LM	
Managing probation	Discuss your role in the probation process for new staff and understand the procedure involved.	LM	
Conducting Performance and Development Reviews	PDR conversations are a great opportunity to pause, reflect and begin to think about the next steps, as well as making time to consider the wellbeing of your staff and to recognise their current and future workload. Discuss the approaches and options available to you as a manager for conducting and recording reviews.	LM	
Finance Services	Discuss any areas of finance responsibility related to your managerial role.	LM	
COVID-19 Advice for staff and managers	During this current period all managers must be conversant with the current regulations and requirements, whether that is guidance about your responsibilities for staff home working or those returning to a campus .	LM	
Onboarding	Discuss your role in the onboarding of new staff members. It is vital that managers are aware of their responsibilities in this process in order to give new joiners a positive experience when they start work.	LM	
Staff safety, health and wellbeing	Discuss your role in supporting your staff and creating a positive working environment. This might include your responsibilities around safety, sustainability and equality, diversity & inclusion.	LM	

Additional Training: The following are suggested for all managers, supervisors and team leaders. Some of the sessions provide information about the processes and procedures specific to the University, while others offer wider development opportunities available to grow your leadership and management skills.

Induction Area	Requirement / Discussion points	Suggested lead	Confirm discussion (initial or N/A)
Leadership and management	Access a number of courses and learning pathways that can assist you to develop in your role. Whether new to management and leadership or someone with experience, the University has development opportunities for all levels.	LM	
Mandatory Training	Confirm any additional requirements for your role beyond the 'All Staff' mandatory courses. Areas might include Corporate Conscience, PDR Reviewer training, Prevent courses, recruitment and selection. Visit the table on the Mandatory Training pages to view the options.	LM	
PDR Information	Managers are required to complete the PDR training relevant to your area. Follow the link below in order to book a session: <ul style="list-style-type: none"> • PDR training and mentoring skills for Academic Leads • PDR training for reviewers of Research staff • PDR training for Reviewers (Professional Services) 	LM	
COVID-19 Skills for Supportive Conversations	Managers are responsible for dealing with the outcomes of COVID-19 self-assessment tools, as well as any follow-up risk assessments and reasonable adjustments, all of which will require you to handle a range of scenarios in a supportive and constructive manner. This session will predominately focus on the skills and behaviours required for having supportive conversations with staff about their working arrangements, which could include a return to campus or a continuation of home working.	LM	
Recruitment and Selection	If your role requires you to recruit staff you must complete the Recruitment and Selection training on LearnUpon in order to sit on or run a panel.	LM	

Additional discussions:

Note below additional areas you might wish to cover, they may be specific to your role, location or personal needs and concerns. Look back through the [Managers, Supervisors and Team Leaders – key information](#) to confirm any areas you might be unsure about. You may want to also note useful contacts.

Induction Area/Contact	Requirement / Discussion Point / Contact Details	Discussed with LM or IF?

Required Actions:

Please complete the table below to identify any actions or training requirements that need to be taken forward:

Action / Training	Date to be completed:	Signed off once complete:
Meet the team, book 1:1s with team members		

Sign off:

Staff member name, signature and date	
Manager /person carrying out induction name, signature and date	