# Induction check list and guide

The Induction checklist is a guide for managing the induction of a new member of staff into the organisation and to ensure that there is co-ordination with all relevant departments.

You are invited to attend the ‘Line Manager Induction briefing’ to support Line Managers in the process of inducting new staff. You can book onto this via the Staff Development Workshop site.

If you have questions, please contact the training team (training@worc.ac.uk).

## KEY ADMINISTRATIVE INFORMATION TO SHARE AT LEAST 2 WEEKS PRIOR TO START DATE

There are some key actions and information that need to be addressed early in the process of preparing for new staff. The following table is designed to help you record this information and know who to share it with (HR, IT, Facilities or Security) when formally registering a request. You should aim to make all induction requests at least **2 weeks prior** to a member of staff joining the University.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Information to share** | **Notes** | **HR** | **IT** | **Facilities** | **Security** | **New Starter** |
| New starter name |  |  |  |  |  |  |
| Staff number(hr@worc.ac.uk) |  |  |  |  |  |  |
| Start date |  |  |  |  |  |  |
| Job title |  |  |  |  |  |  |
| Department |  |  |  |  |  |  |
| Reporting to |  |  |  |  |  |  |
| Campus Site based |  |  |  |  |  |  |
| Building based |  |  |  |  |  |  |
| Room number |  |  |  |  |  |  |
| Furniture required |  |  |  |  |  |  |
| Define what security door access required |  |  |  |  |  |  |
| IT Services required (permissions, equipment, software) |  |  |  |  |  |  |
| Set up on SOLE/Jane/ Marketplace etc.  |  |  |  |  |  |  |
| Uniform or other job specific requirements |  |  |  |  |  |  |
| Mentor from outside the department  |  |  |  |  |  |  |
| Department buddy |  |  |  |  |  |  |

## LINE MANAGER RESPONSIBILITIES PRIOR TO START DATE

* Ensure that the employee has provided their **Right to Work documents** (ideally **2 weeks before the start** date). Contact the HR Operations Team (hr@worc.ac.uk) to review progress
* **Contact new staff**. When the new staff member has returned to HR operations all the necessary documents, they will be added to the HR system. The system will then automatically generate an email to you and to your new starter [(From HR to New Starter).](https://www2.worc.ac.uk/personnel/903.htm) We recommend you contact your new staff member directly to plan with them for the first day. Please see this example email to give you an idea of the topics to cover. [(From the Line Manager)](https://www2.worc.ac.uk/personnel/903.htm)
* Contact training@worc.ac.uk to book new starter onto **HR Welcome and IT Security Awareness Training.** (Mondays 1.00pm- 3.15pm). This time with HR and IT provides information about the University, highlights key requirements and expectations of new staff. Furthermore, it raises awareness of tools, systems, and processes available to support staff in their career at the University of Worcester
* Check if any additional **special requirements or reasonable adjustments** are needed (HR Operations will be able to advise on this if it has been mentioned in the documents returned)
* Prepare **department induction pack**; include appropriate stationery and key equipment and information relevant to the role, include key contacts list and department structure and policies
* Prepare **induction schedule** or list of activities and meetings for first couple of weeks including ‘on the job’ training plan and essential training
* Arrange to **greet new starter on first day**, ideally this should be the line manager
* Arrange a **meeting with the** **Line Manager**– (priority for first day)
* Arrange for department colleague/buddy to go to lunch with new starter on their first day
* Add the new starter to appropriate email distribution lists
* Inform department and relevant colleagues of new starter
* Allocate Mentor and Buddy and let them know the start date

## CHECKLIST FOR FIRST DAY

* **Welcome meeting with Line Manager** to discuss the induction programme and review the schedule for the first week. Best practice recommends that you ask your new team member if they have anything they would like to include. Other items to cover during the first few line manager meetings:
	+ Introduce the department/team organisation structure
	+ Working patterns – lunch and confirm working hours
	+ Overview of roles and responsibilities of wider team
	+ Discuss University’s organisational structure
	+ Explain **local** **Health and Safety** process – fire alarm points, fire escapes, fire assembly points, and first aiders arrangements
	+ Confirm any pre-booked holiday and procedures for future holiday requests and sickness reporting
	+ Recommend new staff book on [**University Induction**](https://www2.worc.ac.uk/personnel/705.htm) and other Induction workshops
	+ **Introduction to their role** key responsibilities, priorities, training needs etc. This is an opportunity for on-the-job training or to start to handover/look at some related documents or software
* **Departmental tour** (buddy could do this) – include relevant teaching rooms, kitchen and toilet facilities, admin facilities, notice boards and location of other key departments, include visit to HR to collect staff card (contact HR operations to arrange appointment)
* **Introduction to colleagues** (more detailed conversations in following weeks)
* Arrange for new staff starter to contact IT Service Desk for **IT** **account credentials** (staff number is required for verification). Ensure that PC is correctly set up and identify any potential IT additional software, equipment or training that may be required
* **Lunch;** a member of the team (possibly the buddy) should invite the new person to join them at lunch time. This is an opportunity to get out of the office and either take a walk around all or part of the University Mile or to try the Dining facilities

# DURING WEEK 1

* Full **tour of campus** and other sites, University mile City, Severn, Lakeside, Hive etc
* DSE Self-Assessment **DSE guidelines and assessment** can be found [here](https://www.worc.ac.uk/facilities-staff/display-screen-equipment.html)
* Reminder to complete essential training courses in Learn Upon
* Prompt person to view induction web pages
* Review any IT training needs and how these can be met
* Arrange for longer meetings with colleagues working closely with the person

# DURING WEEK 2

* Check in with the person about Week 1 and agree dates for future catch up meetings
* Update on progress with essential training courses
* Reminder about mentor contact

# DURING WEEK 3

* Check in with person about Week 2
* Explaining the [Probation Policy](https://www.worc.ac.uk/personnel/documents/Probation_Policy_-_PDF%281%29.pdf) to the employee and give them a copy of the policy and start to confirm objectives for the first part of the probation period
* Confirm dates for probation review meetings
* Consider any training needs that have been identified and how these can be met
* Signpost to internal Staff Development Workshop sessions that can support the person

## ONLINE INDUCTION AND ESSENTIAL TRAINING

During the first few days of induction the new starter should explore the [Induction webpages](https://www.worc.ac.uk/personnel/705.htm) and complete the **Online Essential Training** (this can be found in LearnUpon, at the bottom of the [staff homepage](https://webengine-01.worc.ac.uk/staff/) once signed in).

All new staff are expected to complete this training during their first month of employment. They can confirm completion of the courses with their manager by taking a screenshot or photo of their completed courses on their LearnUpon Account. All essential training has to be undertaken every two years and individuals are responsible for ensuring that they maintain currency in this by carrying forward a diary reminder after initial completion of courses. Any questions about the training should be directed to training@worc.ac.uk .

Essential online training should be prioritised and includes**:**

* GDPR
* UCISA Information Security
* Diversity and Inclusion in HE
* Health and Safety