

Induction guidance

For managers

Guidance and checklist for managers to deliver an induction for a new member of the team.

Table of Contents

[Introduction 3](#_Toc185588182)

[Preparing an induction plan 4](#_Toc185588183)

[Welcoming a new employee 5](#_Toc185588184)

[Managing the first two weeks 6](#_Toc185588185)

[Supporting the new employee to become established in their role 7](#_Toc185588186)

[Induction checklist for managers 8](#_Toc185588187)

[Other Useful Information 13](#_Toc185588188)

## Introduction

This guide has been developed to support a consistent, high-quality induction for all employees starting a new role at the University. Investing in the induction process will help a new employee quickly and fully engage with the work of the University and provide a sound basis for their employment in the longer term.

Effective inductions ensure that new employees get to know what is expected of them in their role, how this relates to wider objective and how to operate effectively in a new setting. They also provide new employees with the support available to do their job to the best of their ability.

Inductions are important for all employees starting a new role; for both new or existing employees.

This guidance should be read in conjunction with:

* Induction checklist for managers
* Induction checklist for new employees
* Probation guidance for managers
* Probation policy

## Preparing an induction plan

Induction is the first element of a successful probation, providing opportunity to quickly establish and set a clear path to confirmation in role. Use the induction checklists for managers and employees to inform a wider induction plan or timetable. In developing this plan, you are encouraged to consider the following:

* **Start before they start.** Sound preparation before a new employee arrives will help with their transition and foster a positive first impression of working at Essex. Be ready to provide clear goals, context, support, and reassurance, as well as opportunity to establish positive relationships with the team and colleagues in the wider organisation.
* **Be clear about the job role, responsibilities and expectations.** Employees become productive sooner if they understand the fundamentals of their jobs. Where possible, focus on the why, when, where, who, and how of the role and its activities before you fully hand over any assignments or projects.
* **Induction is more than a tick box exercise.** Use the checklist as a core part of your induction plan to ensure that essential activities are included. Remember that induction is an opportunity to establish a new employee in their role and as a member of our community. When preparing your plan, allow additional time for new opportunities, events and activities that will support them in understanding their role and their new workplace.

## Welcoming a new employee

Whilst there is no expectation that you do so, an informal meeting with a new employee before they join the team can provide an opportunity for you to begin to establish your working relationship outside the interview setting. This can also be an opportunity for them to gain greater understanding about the organisation and the job they will be doing. Keeping in touch in this way encourages enthusiasm for the role, maintains commitment and an opportunity to address any queries that may arise.

The first day in any job is a critical moment in which a new employee’s relationship with an organisation and their manager can be firmly established. In this context it is important that you are available to meet with your new colleague on their first day, or as soon as is practicable, ideally greeting them, introducing them to immediate colleagues, settling them into their new surroundings and commencing induction activities. If it is not possible for you to meet them personally, then it is essential that another member of the team is fully briefed to do so.

When meeting for the first time:

* **Be present.** Arriving on time and having enough time will ensure that you can remain focused on your new colleague during your initial meeting.
* **Be prepared.** Whilst it is possible that there will be a range of questions to answer, take the time to consider what the key messages are that you would like to share with your new colleague.
* **Be authentic.** This will help you build trust and set your relationship on a firm foundation.

## Managing the first two weeks

Building on the points within the Induction Checklist for Managers, make use of the ideas and prompts below to support the induction process.

* **Open communication channels.** Provide and be open to feedback, encourage questions and progress updates. Support a culture of collaboration, problem solving and inquisitiveness.
* **Create time for first impressions.** It is essential to give new employees the space to acclimatise during their first week, explore their surroundings, and get to know the finer details of their role and its context. Creating time to understand their experiences can offer insights to inform additional induction activities and improve practices for the future.
* **Communicate expectations.** Take time to discuss the role, its context, tasks, responsibilities and standards to be achieved. Outline what can be expected from colleagues to help with the job. Provide opportunity for questions about the role and expectations, as well as to share what they hope to get from you and the team to help them perform well.
* **Keep your plan under review.** Initial induction conversations may indicate that additional introductions would be beneficial to a new employee. As they get to know their role, keep reviewing the key people they need to meet, and assist them in doing so.
* **Appoint an induction buddy.** Ensuring a meaningful induction is a line management responsibility. However, identifying an induction buddy for a new employee is a useful way to provide additional support and guidance, reducing any uncertainty on their part around who to ask questions, and allowing induction activities to continue should you be unavailable.
* **Establish a plan for probation.** Ensure you understand [the policy and guidance in relation to probation](https://www.essex.ac.uk/staff/starting-at-essex/probation) and meet to discuss and agree a plan within the first two weeks. A Probation Agreement template can be found in the Probation Guidance for managers.

## Supporting a new employee to become established in their role

As new employees become established in their role you should start to see increased confidence and effectiveness in their work. Achieving this requires continued communication, support, and review in relation to expectations, processes, goals, procedures, establishing relationships and developing skills. Having regular conversations focused on these themes will ensure that new employees are given the best start in their role, enabling them to complete their probation period successfully.

Here are some considerations for induction reviews.

* **Keep reviewing goals and progress.** Regular conversations ensure that expectations remain aligned, and that new employees are fully supported. Remember that this could be with the line manager or a delegated individual such as an induction buddy. Guidance for getting the most out of your meetings can be found in the Probation Guidance for Managers.
* **Ensure awareness of key employee policies and processes.** Do not assume that new employees are aware of information that you might consider to be obvious. This will vary depending on context, and it is always worth checking that they are aware of core people processes, such as: leave arrangements, sickness reporting, flexible, hybrid and out of country working arrangements, HR Organiser profiles and searching the Staff Directory.
* **Review and identify development opportunities.** Define any development opportunities that may be appropriate. Provide regular, ongoing feedback on performance and provide practical advice. You could also arrange job shadowing or mentoring, as well as identifying on-the-job learning or formal training programmes.
* **Actively listen.** Take the opportunity to gain feedback from a new employee about how you can help, the induction programme, and the University in general. You can use this to improve the process next time around and adapt their induction plan.

## Induction checklist for managers

### Preparing an induction plan

|  |  |  |
| --- | --- | --- |
|  | Steps | Details |
|  | **Preparation and communication** | Send a personalised welcome message introducing yourself and the team. When engaging with the new employee, ensure that you:   * Signpost to the Welcome to Essex Staff Directory page so that the new employee is aware of what to expect before their first day. * Confirm specific requirements, such as accessibility needs or reasonable adjustments (DSE), and offer guidance on [travel, transport and accommodation and parking](https://www.essex.ac.uk/staff/travel-and-transport/campus-accommodation). * Share first-day arrangements such as where to meet, timings and a schedule of activity. * Schedule a preliminary meeting to stay in touch where possible. |
|  | Provide your team and key stakeholders with details about the new employee to outline their, name, role and any relevant background information. |
|  | Maintain contact with Resourcing Team and ensure pre-employment checks have been completed (including references) and that the contract has been checked and signed. |
|  | **Workspace setup** | Prepare a workspace with necessary equipment and supplies. If hotdesking, ensure a locker / storage is available. |
|  | Ensure IT access will be available, including login credentials, email setup, and access to relevant software and systems. [Getting started with IT for staff](https://www.essex.ac.uk/staff/it-services/getting-started-with-it-for-staff) |
|  | **Induction planning** | Develop an induction schedule and work plan for the first two weeks, building on this list and the Induction Guidance for Managers. |
|  | Familiarise yourself with the functions of [People Manager](https://www.essex.ac.uk/staff/managing-people/using-people-manager) |
|  | Assign a buddy and ensure they are aware of their role to support the induction. |
|  | Ensure that you or another member of the team is available to welcome the new employee on their first day. |

### Welcoming a new employee

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|  | Steps | Details |
|  | **Introductions, essentials, and documentation** | Introduce induction buddy and other key colleagues. |
|  | Discuss working arrangements (e.g. hybrid working, flexible working etc.), the induction plan, upcoming activities, and any immediate needs. |
|  | Share and talk through an organisational chart and department chart. |
|  | Provide an overview of the tasks and responsibilities of the role. |
|  | Ensure pre-employment checks have been completed (including references) and that the contract has been checked and signed. |
|  | Arrange a [campus staff card](https://www.essex.ac.uk/staff/starting-at-essex/campus-card). |
|  | Orientate to core systems and resources including:  [HR Organiser](https://hrorganiser.essex.ac.uk/tlive_lss/ess/dist/#/login) - How to [book leave](https://www.essex.ac.uk/staff/taking-leave/taking-annual-leave) and [reporting sickness absence](https://www.essex.ac.uk/staff/taking-leave/sickness-leave)  [Staff Directory](https://www.essex.ac.uk/staff)  [Onbase](https://www.essex.ac.uk/staff/managing-people/onbase) (for pathway to permanency) |
|  | Undertake a [DSE self-assessment](https://www.essex.ac.uk/staff/equipment-safety/display-screen-equipment). |
|  | Orientate to [People and Culture policies, procedures and guidance](https://www.essex.ac.uk/staff/employment-policies-and-procedures) and any other operational polices or procedures relevant to the role. |
|  | **Technical setup** | Assist with [IT account](https://www.essex.ac.uk/staff/it-services/account) set up and access to [Email and Calendar](https://www.essex.ac.uk/staff/it-services/email), [shared drives](https://www.essex.ac.uk/staff/it-services/storage), and access to relevant [mailing lists and groups](https://www.essex.ac.uk/staff/it-services/email) platforms. |
|  | Establish / update [staff profile](https://www.essex.ac.uk/staff/managing-people/line-manager-responsibilities-for-staff-profiles). |
|  | Update relevant School or Departmental web pages with new details (if applicable). |
|  | **Orientation, compliance and safety** | Ensure completion of the annual How We Work at Essex training and any other role based [essential training.](https://www.essex.ac.uk/staff/professional-development-and-training/essential-training) |
|  | Explain [actions in event of fire](https://www.essex.ac.uk/staff/emergencies-security-and-safety/fire-emergency-action), how to call for help, location of emergency exits and muster points.  Identify fire marshals and first aiders.  Introduce [general information on emergencies and safety](https://www.essex.ac.uk/staff/emergencies-security-and-safety#emergencies) that is on the Staff Directory.  Ensure knowledge of where to report safety / estate concerns. [ems-helpdesk@essex.ac.uk](mailto:ems-helpdesk@essex.ac.uk)  Ensure full completion of the [Health and Safety Induction Checklist](https://moodle.essex.ac.uk/pluginfile.php/1208913/mod_resource/content/0/Induction%20ChecklistJan20.pdf) |
|  | Explain employee [health and safety responsibilities](https://www.essex.ac.uk/staff/starting-at-essex/staff-health-and-safety-responsibilities), and any additional requirements specific to the role, including PPE. |
|  | Ensure that a campus tour is arranged, including orientation to key facilities, where appropriate.  Further information is available in relation to [Food and drink](https://www.essex.ac.uk/staff/food-and-drink), [Theatre and arts on campus.](https://www.essex.ac.uk/staff/theatre-and-arts-on-campus) |

### Managing the first two weeks

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|  | Steps | Details |
|  | **Organisational understanding** | Provide an overview of the University (including mission, vision, values, and culture), the department and the team. Explain how their role fits. |
|  | Share details of our [Governance structure](https://www.essex.ac.uk/governance-and-strategy/governance), and discuss the role of the [Council](https://www.essex.ac.uk/governance-and-strategy/governance/council) and [Senate](https://www.essex.ac.uk/governance-and-strategy/governance/senate), how they work, and how to get involved. |
|  | Outline team goals and priorities and how their role contributes to these. |
|  | **Ongoing support and development** | Schedule regular 1-2-1 check-ins. Reassure and ensure understanding of opportunity to communicate and raise queries / concerns outside these meetings. Establish and encourage open communication. |
|  | Regularly communicate, review and support team procedures and role expectations, linking them to strategic and team goals and the probation guidance. |
|  | Ensure meetings with key colleagues are undertaken to introduce themselves and their work and discuss how they will work together. |
|  | Introduce the Development at Essex area of the staff directory. Identify induction and training development events to support the new employee during the probation period. |
|  | Introduce [staff wellbeing](https://www.essex.ac.uk/staff/health-and-wellbeing) resources and networking [groups and forums](https://www.essex.ac.uk/staff/forums-and-networks) |
|  | Provide information on [employee benefits](https://www.essex.ac.uk/staff/pay-and-rewards/benefits-and-discounts). |
|  | Introduce the Employee Relations team and its role |
|  | Prepare a [probation](https://www.essex.ac.uk/staff/starting-at-essex/probation) agreement (template is included in the Probation Guidance for Managers). |

## Other Useful Information

[Starting at Essex](https://www.essex.ac.uk/staff/starting-at-essex)

[Probation](https://www.essex.ac.uk/staff/starting-at-essex/probation)

[All About University of Essex](https://www.essex.ac.uk/about)

[Trade Unions at Essex](https://www.essex.ac.uk/staff/governance/trade-unions-at-essex)

[University governance](https://www.essex.ac.uk/staff/governance)

[University strategy](https://www.essex.ac.uk/governance-and-strategy/university-strategy)

[University Partnerships](https://www.essex.ac.uk/staff/university-partnerships)

[Staff Benefits and Discounts](https://www.essex.ac.uk/staff/pay-and-rewards/benefits-and-discounts)

[Performance and Development Reviews](https://www.essex.ac.uk/staff/managing-people/conducting-appraisals)