School of Medicine

Induction Checklist for Managers

2014

Introduction

This checklist provides guidance on the types of issues and information that should typically be covered during induction. This document should be read and used in conjunction with the Induction Guidelines which can be viewed at: Induction Guidelines for Managers

Please note that certain items may not be applicable to all staff. Similarly, there may be other items/activities which will need to be added to the list. The checklist should therefore be adapted to fit with the needs of the member of staff. In addition, it may be appropriate for the line manager to delegate certain tasks to other members of the team and/or the induction buddy.

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- Introductions / General Arrangements
- Health & Safety
- Working Practices & Procedures
- Role
- Departmental Operations & Procedures
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PRE-ARRIVAL	Person Responsible	Completed
• Create induction programme (schedule meetings with relevant staff)		
• Issue 'welcome' letter or email (see Induction Guidelines)		
• Inform others in the team/unit of the new member of staff's arrival		
• Identify and liaise with ' induction buddy' / mentor (if applicable)		
• Organise office equipment (e.g. computer, telephone, stationery, keys etc)		
• Ensure set up of email account / IT username		
• Organise any relevant training		
• Book place on next University induction event		
• Ensure documentation is available e.g. copies of relevant policies etc		
• Confirm start date and time with initial point of contact/receptionist		
• Ensure member of staff has provided Corporate HR with pre-employment/working permission documents prior to start date		

INTRODUCTIONS / GENERAL ARRANGEMENTS (To be covered on day 1)	Person Responsible	Completed
• Welcome by line manager/supervisor (explain arrangements for induction programme & refer member of staff to induction webpages)		
• Introduce to departmental/team colleagues		
• Introduce to induction buddy / mentor (if applicable)		
• Arrange for member of staff to visit Corporate HR to collect their staff ID card		
• Ensure P45 & bank details have been forwarded to Payroll		
• Ensure the person knows about Local facilities: workplace/area; equipment; toilets; kitchen; rest facilities; car parking; bike shelters; etc		
• Check email account / IT username active		

HEALTH & SAFETY (To be covered on day 1)	Person Responsible	Completed
• Fire alarm, evacuation and emergency procedures		
• Identify first aider/s and how they can be contacted		
• Location of first aid kit & fire extinguishers		
• Accident/incident reporting procedures		
• Specialist health & safety procedures/training (if applicable)		
• Refer member of staff to Health, Safety & Wellbeing e-induction		

WORKING PRACTICES & PROCEDURES (Week 1)	Person Responsible	Completed
• Hours of work, breaks, flexi-time (where relevant), time-keeping		
• Sickness notification & reporting procedures		
• Annual leave procedures (booking/taking leave etc)		
• Refer to relevant HR policies/procedures		
• Refer to Equality & Diversity e-induction		
• Remind of need for confidentiality		

ROLE	Person Responsible	Completed
• Clarify job description (key duties and responsibilities)		
• Expected performance standards / appropriate conduct		
• Explain how role fits in with College and University objectives		
• Underline the importance of all staff contributing to the delivery of world leading research and teaching and how their specific role helps deliver this.		
• Key internal / external contacts		
• Probationary process		
• Performance & development review process		
• Review training needs (as identified at interview stage)		

DEPARTMENTAL OPERATIONS & PROCEDURES	Person Responsible	Completed
• Meet key contacts within the School/RI/Service		
• School/RI/Service objectives & strategic plan		
• Organisational chart/staff lists		
• Calendar of events, meetings & communications		
• Social activities/networks		
• Finance procedures e.g. purchasing, expenses, travel		
• Training & development opportunities		
• Administrative systems e.g. booking rooms, ordering stationery etc		

UNIVERSITY INFORMATION	Person Responsible	Completed
• University vision, objectives and structure		
• Tour of campus		
• University induction event (encourage attendance)		
• University communications (MyGlasgow, campus e-news/magazine etc)		
• Staff directory		
• Campus facilities: catering, library, sport and other social facilities		
• Support services – Human Resources, Occupational Health, Employee Counselling Service		

IT & OTHER EQUIPMENT	Person Responsible	Completed
• IT system, shared drives, directory structure etc		
• Email & calendar system (use of webmail & VPN)		
• Employee Self Service / Manager Self Service		
• Internet, telephone & email usage (refer to IT usage policy)		

An Induction Buddy

New staff may benefit from knowing that there is a designated colleague there to help them settle in, and to whom they can turn for general information and guidance, particularly during the first few days and weeks of the job. An induction 'buddy' essentially acts as a link between the new member of staff and the School/RI/Service within which they will be working.

The Role of the Buddy

The main purpose of the buddy is to:

- Provide an informal point of reference and friendly face in the first few weeks/months of the job;
- Help answer day-to-day questions and general queries that the new member of staff may have about the team/unit and the role;
- Help encourage communication, and prevent the new member of staff feeling isolated;
- Act as a link with other staff members;
- Help with the orientation process.

Criteria for a buddy

A buddy should be selected on a voluntary basis, and should be:

- An experienced staff member from within the same team/unit as the new recruit;
- Ideally on the same or similar grade as the member of staff, and from a similar role;
- Someone who can be trusted to give accurate information.

The individual who is selected to act as a buddy should be provided with a clear brief in terms of their remit and role in the induction process.

Welcome letter

It is suggested that the new start receive a personal letter of welcome from their line manager and some information on what to expect on their first day, lunch arrangements etc. The letter should also request that the new member of staff report for work at 10am; this allows everyone in the School/RI/Service to be prepared. A copy of the Induction Programme planned for them should also be provided.

Below is an example of a welcome letter, areas in bold should be amended appropriately:

Dear **A N Other**

We are delighted that you will be joining us on **DD Month Year** and look forward to welcoming you to the School. Please report to the **XX Office Location**, at 10am and ask for myself.

Enclosed you will find:

- *A booklet that introduces the School.*
- *Staff list and contact details.*
- *An Induction Programme that I hope will help you to settle in as soon as possible. This programme will provide you with the key information that you will need about the School, the University and your new role here.*

You will also find some useful information on our website:

http://www.gla.ac.uk/schools/medicine/

I have arranged for **A MEMBER OF STAFF** to have lunch with you on your first day. I hope this is acceptable to you.

In the meantime, if you require any further information, please do not hesitate to contact me.

Yours sincerely

Line Manager

Below you will see suggested areas to cover in a new member of staffs an induction programme:

SESSION	SUGGESTED CONTENT OF SESSION
Introduction to the School **HOS or Head of Section**	• Mission, Vision, Objectives of the School • How the School fits in to the wider University • Section structure • Give question sheet for use in final review meeting
Introduction to other members of staff **Line Manager**	• Go through Section organisation chart • Discuss roles and responsibilities of staff in the Section in general terms • May also want to extend time to allow visits to key contacts outwith the School
Physical/Virtual Orientation **Line Manager/Nominee**	• All key operational and social areas to be visited (e.g. Offices, Labs, Refectory, Library) • Familiarisation with School/Section website
Terms and Conditions **Local Senior Administrator/Nominee**	• Hours of work, pay day, increments, P45 to payroll pension, holiday entitlement • Procedure for requesting holidays, sickness procedure, internet and e-mail usage • Other University procedures e.g. probation (if applicable), discipline, grievance, competence etc. • Joining Stevenson Building, Joining Library, Parking permit procedure etc.
Culture of the School **Local Senior Administrator/Nominee**	• Dress Code, lunch arrangements, timekeeping, housekeeping (e.g. kitchen etiquette, tea and coffee rota), covering for sickness and holidays, answering telephone calls when others are not at desk, passing on messages, social activities • Equality and Diversity
Office Systems **Local Senior Administrator/Desktop Technician**	• How to answer telephone, filing systems and dealing with reception/visitors • How to login to computer (security issues), how to use e-mail, shared drives and intranet • Room bookings
Informal review meeting	• It is important that the Induction Programme is reviewed as it progresses to ensure it is effective. At the end of the first day it is important for the Line Manager and the new member of staff to review the first day. This is important to ensure that the new member of staff is clear what the following few days will entail and for the Line Manager to ensure that the new member of staff

Line Manager	has started to settle in
	• Give induction review form for completion before final review meeting
	• Fix up time for final review meeting
Health and Safety/Security **Health & Safety Co-ordinator**	• Physical – fire exits, fire alarms, fire evacuation procedure, fire-training arrangements, manual handling, first-aid arrangements
	• VDU – DSE requirements and arrangements
	• Access to seminar rooms/lecture theatres and log in procedure
Performance Standards and Training and Development Opportunities **Section Head**	• Specifics of job role - (job descriptions)
	• What is expected from them, from whom
	• How their performance will be reviewed (performance management)
	• Training and Development Opportunities available to staff (Staff Development Service)
	• Personal Development Planning (see Performance Management Policy) unless covered by Probation Policy in which case the Probation Policy would apply
Final review meeting **Line Manager**	• It is important that the Induction programme is reviewed at the end of the programme. At this point the Line Manager and the new member of staff should review if the objectives of the Induction programme have been met and agree the next stage of development for the new member of staff (the Probation Policy may apply)

Induction information sheet

As you go along note the answers to the following questions. The purpose of the document is to identify any information you may have missed during the Induction Programme. If you are unsure of any of the answers please speak to your Line Manager.

Name: _____Date: _____

1.   Who are the first-aiders in the department and how would you contact them?

_____

_____

2.   If you had a question about your computer, who in the department would you contact in the first instance?

_____

3.   Who in your section is the Health and Safety contact and who is the overall departmental Health and Safety co-ordinator?

_____

_____

4.   If the fire alarm sounds, from your workstation, where is the nearest exit and where should you assemble?

_____

_____

5.   How should you answer the telephone in the department?

_____

_____

6.   What is the procedure in the department for requesting a holiday?

_____

_____

7.   If you are unable to come to work due to illness, what is the procedure in the department for reporting this?

_____

_____

8.   What is the departmental policy on use of e-mail and the internet?

Please use the space provided to note any other information you wish to keep for reference.