**New Starter Induction Checklist**

*This checklist is intended to help the colleague/s responsible for inducting a new starter, whether their role will be solely based on campus or allows for working both on and off campus (hybrid working).
It is not an exhaustive list but an aide-memoire and may therefore be modified to suit the induction needs of any new starter, to incorporate local induction practices within each School/Service.
It is recommended that a checklist is completed for all new starters, whatever the nature of their role and contract, making any appropriate adjustments.*

**Employee Name Area**

**Position Title Start Date**

**Manager Buddy**

**Date Checklist Completed\***

**Preparation / Before the new starter arrives**

A welcome discussion/email in advance of the new starter commencing their role is important, for clarity and to stay in contact between the recruitment process and start date. This could include –

* an itinerary for the first few days/week, to help set the new starter’s expectations for when they start;
* details of any key initial contacts;
* sharing any relevant documents, to give insight into the University and School/Service culture, vision and values;
* an update on what equipment and software they will need when they start and arrangements for providing them access, where required.

|  |  |  |
| --- | --- | --- |
| Action | Suggested person | Date Completed |
| Arrange a pre-start discussion/email with the new starter, as above | Manager |  |
| Make arrangements with the new starter for their first day. Advise when, how and who to report to and provide any details of their induction programme, including scheduled meetings/training etc. | Manager/School Secretary |  |
| Email the department to make them aware of the new starter, including their name, start date and position title | Manager |  |
| Ensure the new starter has the relevant equipment available, including-* workstation/space
* PC/laptop
* headset
* stationery
 | Manager/School Secretary |  |
| Plan new starter meetings, including with - * their immediate team
* relevant senior managers within the School/Service
* plus regular one to one updates with the manager
 | Manager/School Secretary |  |
| Arrange an [Onboarding Buddy](https://www.leedsbeckett.ac.uk/-/media/files/people-development/buddy_managers_v5final-branded-version.pdf) for the new starter, someone who already works in the team and will work closely with the manager to take responsibility for some of the informal, more social parts of the induction  | Manager/School Secretary |  |
| Add the new starter’s name to relevant lists/groups/meeting invites | Manager/School Secretary |  |
| Prepare and share relevant documentation, such as –* [University Strategic Planning Framework](https://www.leedsbeckett.ac.uk/-/media/files/we-are-beckett/leeds_beckett_strategy.pdf)
* School/Service plan/strategy
* School/Service handbook and prospectuses
* Structure chart
* Team introductions/overview document
* Learning and Teaching Strategy
 | Manager/School Secretary |  |
| Arrange the relevant system access and training resources(For example, Office 365, iTrent Self-Service, Symplectic, MyBeckett, Turnitin, CAGD, VTS, SEMS, Research Ethics Online) | Manager/School Secretary |  |
| Arrange for the new starter to receive their login details before/on the new starters first day (via HR Services) | Manager/School Secretary |  |

**First Day/Week**

|  |  |  |
| --- | --- | --- |
| Action | Suggested person | Date Completed |
| Initial meeting with the manager, covering aspects such as –* their responsibilities/job description
* individual/team objectives
* immediate development needs
* working arrangements and procedures
* information about the department/University, including values and structure
* how their role fits into departmental and University objectives
* key links/contacts
 | Manager |  |
| Meeting with the manager/School Secretary to cover such as -* the induction plan/schedule
* details of School/Service meetings and key dates
* HR documents and information, including signposting [Colleague Essentials](https://www.leedsbeckett.ac.uk/staffsite/services/human-resources/colleague-essentials/) and [Managers’ Essentials](https://www.leedsbeckett.ac.uk/peopledevelopment/managers-essentials/) (if applicable) webpages
* relevant [policies](https://www.leedsbeckett.ac.uk/our-university/public-information/university-policies/human-resources-az/), such as Equality, Diversity and Inclusion
 | Manager/School Secretary |  |
| Introduce the new starter to other team members | Buddy/Manager |  |
| Discuss probationary period and [policy/procedure](https://www.leedsbeckett.ac.uk/-/media/files/policies/human-resources/uphr_probationary_policy.pdf), if applicable, including how long it lasts, when review meetings will take place and expectations | Manager |  |
| Ensure the new starter registers with Multifactor Authentication (MFA), sometimes called two-step authentication, after receiving their university account. This is an additional security measure set up to protect access to systems and services, meaning that colleagues have to provide another method of identification before being able to access university systems and services. [Colleagues should review the MFA Sway document and introduction video.](https://eur02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fsway.office.com%2FqRt01Dyt2owAr3bl%3Fref%3DLink&data=04%7C01%7CC.Pickard%40leedsbeckett.ac.uk%7C07e16b32f3a54b56dd1b08d8fa61616a%7Cd79a81124fbe417aa112cd0fb490d85c%7C0%7C0%7C637534643451571832%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=I2BQqyY1m1vO6wyPkU4F%2B2UsKIH%2FbPiWEUaKfHTltCA%3D&reserved=0) | Manager |  |
| Initial meeting/s with Buddy, covering such as – * discussion of day to day role
* accessing/using key systems and software such as Office365
* office tour and campus information/[map](https://www.leedsbeckett.ac.uk/-/media/files/we-are-beckett/mu_campus_maps_sep21.pdf)/[virtual campus tour](https://www.leedsbeckett.ac.uk/our-university/our-campuses/)
* answering any further, initial questions
 | Buddy |  |
| Local Health and Safety induction, including –* relevant H&S documentation and guidance
* on campus fire procedures
* accident reporting procedure (HS1 form, emergency number x4444)
* security details/contact
 | H&S Co-ordinator |  |
| Ensure the new starter can access the relevant essential online modules via [MyDevelopment](https://www.leedsbeckett.ac.uk/mydevelopment) | Manager/School Secretary |  |
| Ensure the new starter books onto the next available [WTLB virtual induction session](https://leedsbeckett.learningpool.com/course/view.php?id=188) and [Connecting our Community session](https://leedsbeckett.learningpool.com/course/view.php?id=189) (and accesses the [academic staff introductory session](https://www.leedsbeckett.ac.uk/staffsite/services/centre-for-learning-and-teaching/educational-development/supporting-new-staff/), organised by CLT, if applicable) | Manager/School Secretary  |  |
| Explain/demonstrate [Employee](https://hrss10.leedsbeckett.ac.uk/trenprod_ess/ess/dist/)/[Manager](https://hrss10.leedsbeckett.ac.uk/trenprod_web/wrd/run/etadm001gf.open) self-service and [highlight associated user guides](https://www.leedsbeckett.ac.uk/staffsite/services/human-resources/working-here/management-information/itrent-self-service/)  | Buddy/School Secretary |  |
| Check the progress of new starter meetings | Manager |  |

**After First Week / Ongoing**

|  |  |  |
| --- | --- | --- |
| Action | Suggested person | Date Completed |
| Hold regular update meetings, including to check settling in/progress; agree PDR objectives; discuss emerging development needs and check progress with essential online training | Manager |  |
| Discuss research plans, where applicable | Manager |  |
| Hold a minimum of 2 progress review meetings during the probationary period, if applicable | Manager |  |
| Arrange regular follow ups with the new starter at a suitable frequency | Buddy |  |

**End of induction (typically 3 months)**

|  |  |  |
| --- | --- | --- |
| Action | Suggested person | Date Completed |
| Meet to review the effectiveness of the induction programme, any outstanding issues and the new starter’s probationary period, if applicable | Manager | \* |

Hybrid working considerations –

For further support around hybrid working, our University has a [Ways of Working webpage](https://www.leedsbeckett.ac.uk/ways-of-working/) that includes some helpful information and resources around ways of working, and answers to frequently asked questions.

* **What additional support might the new starter require when they are hybrid working?**

For example, it will be important to plan regular check-in meetings and regularly check any training requirements. It can be more difficult for colleagues who are hybrid working to learn ‘on the job’, so consider and be considerate of what support they will need when learning about our processes and systems.

* **How can the need for balance and structure when hybrid working be supported?**

For example, discussing and agreeing working arrangements and expectations with the new starter.

* **What key things will the new starter need to immerse them into the role?**

For example, setting clear expectations and ensuring the new starter has clarity on any initial tasks/projects, including clear timeframes to work towards.

* **How can you ensure the new starter feels connected and involved?**

For example, setting up a team overview document and meetings to introduce and build relationships with other team members and key contacts for the role. With the team this could include introducing everyone, giving an overview of what everyone does and how they’ll work together.

* **Outside of scheduled meetings, what’s the best way for the new starter to stay in contact and ask any questions?**

It’s to be expected that the new starter will have a lot of questions. How and who should they direct these to?
How could the new starter’s Buddy support this?

* **What individual requirements does the new starter have?**

This could be anything that impacts their ability to meet the expectations of the role when hybrid working. For example, do they have all the equipment they require and access to the relevant systems?

* **Signpost colleagues to -**
* The [IT Services Working from Home](https://www.leedsbeckett.ac.uk/staffsite/services/it-services/about-it-services/working-from-home/) support page, including information on how to get set up and access files, equipment and useful resources when working remotely;
* The Homeworking guidance document available via [Health and Safety](https://www.leedsbeckett.ac.uk/staffsite/services/estate-services/safety-health-and-wellbeing/safety-health-and-wellbeing-a-to-z/), with useful guidance on taking your own precautions in creating a safe and healthy environment when working remotely;
* Our University’s [Wellbeing pages](https://www.leedsbeckett.ac.uk/staffsite/services/human-resources/working-here/wellbeing-and-occupational-health/wellbeing/), including support and advice on how to look after your mental health and wellbeing.