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**TCF Induction Policy and Procedure**

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| **Review Date & Version #** |  |
| **Owner** | Judy Mallinson |
| **Reviewed by** | Judy Mallinson |
| **Support/Co-review** | Sue Clements |
| **Date due for review** | 31st December 2015 or earlier as required by change |

**Policy and Aim**

It is the Foundation’s policy to provide appropriate induction training for all new employees and for those employees who are transferred, promoted or returning to work after a long period of absence.

Induction is the final part of recruitment. It provides basic knowledge about the Foundation and the employees’ new job. It is designed to introduce an employee to their new environment and to provide an extra level of support during their “settling in” period.

**Benefits of Induction**The benefits of a good induction are:

* It will help control recruitment costs as employees who receive a proper induction are more likely to stay with the Foundation
* It shortens the time it takes for an employee to become effective in their new job
* It enhances the image of the Foundation for new employees, for members who receive better service and for existing employees who appreciate more effective colleagues
* It ensures employees know and understand the formal rules which they are expected to follow and will help ensure they are committed to following them
* It helps new employees understand the informal rules and the culture of the Foundation
* It provides a good basis for specific job training & development thereby helping the employee become competent more quickly

**Induction Checklist**The attached induction checklist should act as a guide and although the requirements for the first day are standard, the specific activity during the first week/month may vary according to the individual employee.

**Who should receive Induction?**All employees regardless of employment status should receive an induction. Extra care and support should be given to anyone who has not worked before or has had a long break from work, or anyone who might have language difficulties or a disability.

**Methods of Induction**Induction is provided using the following methods:

* Briefing meeting with line Manager
* Briefing meeting with Office Facilitator, to include Health and Safety
* Support and coaching from line Manager and Team
* Off the job training courses
* Work shadowing

**Manager’s Responsibility**Managers should allocate clear responsibility for induction of new employees to a member of their team, including identifying an employee mentor for each new employee.   
  
A written orientation plan with specific deadlines should be agreed with the new employee to cover their assumption of the duties in their job description.  
  
All departments within the Foundation must have a written induction process for employees which should cover:

* The work of the department, including an explanation of how it fits into the structure of the Foundation and what the department objectives are
* Introducing the employee to their work environment and colleagues
* Introducing the employee to the functions of the department, its management and structure
* Informing the employee of the Foundation’s work systems, processes and environment
* Discussing the role/job/functions of the employee within the department and to set key personal objectives to be achieved during the probationary period
* Employee responsibility and accountability
* Employee security
* Employee attendance
* Informing the employee of Health and Safety considerations directly affecting his or her role within the department
* Training and development opportunities in the department
* Reviewing the induction procedure at 1 month, 3 months and 6 months after the employees start date, to include whether development needs have been met

**Mentor**A mentor, ideally a member of the same department, should be available for the first four weeks to assist the new employee with any queries they may have, including:

* Location of local amenities, employees’ canteen, pigeon holes, etc.
* How to obtain equipment and resources, meeting room bookings, etc.
* Location of other departments
* Introductions to key personnel
* Demonstrate use of the Foundation’s Intranet and web site

The mentor will also provide general support and assistance during the settling in stage, as required.

**Induction Procedure**

There are three main stages to the induction:

* pre-start period
* **induction**
* **evaluation**

The following checklist provides a framework for the planning, delivery and evaluation of the induction period. It should be completed and filed by the relevant line manager.

#### Induction checklist

**New employee**…………………………………………………….....................

**Start date** ……………………………………………………...................................................

**Line manager** ……………………………………………………............................................

## PRE-START

Action to be taken from the date appointment is confirmed

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| **Action required** | **Responsibility** | **Completed** | **Notes** (record any further action points, general comments or reminders) |
| Request/approve/file workreferences.  Send/file signed contract of employment  Send/review/file completed medical questionnaire |  |  |  |
| Inform department employees of new employees’ arrival and start date and invite them to join welcome lunch |  |  |  |
| Identify and order equipment and other items e.g. computer, telephone, furniture, business cards, stationery  Does the new employee have any special requirements that need to be catered for, e.g. to accommodate a disability? |  |  |  |
| Appoint a mentor to help the new employee to settle in and ensure they understand their role |  |  |  |
| Identify/diarytime with employee. Await arrival to discuss any further employee needs |  |  |  |
| Develop/send induction plan to new employee in advance and ensure they understand arrangements for their first day i.e. time of arrival, location and who will meet them |  |  |  |
| *Please sign to confirm that all required actions have been completed* |  |  | *Line Manager*  *Signature* |

**FIRST DAY**

|  |  |  |  |
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| **Action required** | **Responsibility** | **Completed** | **Notes** |
| In the morning,welcome employee and introduce to colleagues, office layout and desk |  |  |  |
| Run through induction plan for the day and provide handbook, and relevant literature  Request completion of new employee starter formrequiring bank details for payment purposes, submission of P45/6 and copy of passport and/or other documentation as required  (check / copy / sign/ file) |  |  |  |
| Introduction tooffice systems, including computer and email login, shared server, diary system, connection to printers, photocopier/fax machines, post trays    Providefamiliarisation tourof building, including main meeting room(s), toilets, kitchen, smoking areas (if appropriate) |  |  |  |
| Welcome lunch. If convenient include mentor and other department members |  |  |  |

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| **Action required** | **Responsibility** | **Completed** | **Notes** |
| In the afternoon,run through safety,security and administration:   * provide an office key/alarm codetc. And explain first in/last out of office procedures * explain accident and incident reporting, emergency equipment/steps, first aid box, nominated persons, workstation audit * room bookings, ordering stationery, telephone enquiries, visitors and daily timesheets * Fire procedures (Fire Alarm, exits and evacuation procedures) |  |  |  |
| * Manual Handling Training  (if applicable) * Computer Assessment  (if applicable) |  |  |  |
| Briefing on the organisation including history, culture and values, structure/interfaces and business plan, with time for questions |  |  |  |
| *Please sign to confirm that all required actions have been completed* |  |  | *New employee*  *signature* |

**SECOND DAY**

|  |  |  |  |
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| **Action required** | **Responsibility** | **Completed** | **Notes** |
| In the morning, review of handbook and key policies, with opportunity for questions and signature  Introduction to employees’ work plan, review/discussion of job descriptionand preferred ways of working.  Briefing/guidance on priority deliverables and agree short and medium-term goals |  |  |  |
| In the afternoon, informal chats with other employees in the organisation to find out what they do and any relevant projects or information |  |  |  |
| *Please sign to confirm that all required actions have been completed* |  |  | *New employee*  *signature* |

**THIRD DAY**

|  |  |  |  |
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| **Action required** | **Responsibility** | **Completed** | **Notes** |
| Discussion and explanation of project management system with an opportunity for questions  In the afternoon, informal chats with other employees in the organisation to find out what they do and any relevant projects or information |  |  |  |
| *Please sign to confirm that all required actions have been completed* |  |  | *New employee*  *signature* |

**REVIEW**

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| --- | --- | --- | --- |
| **Name**: | | **Start Date:** | |
| End of Week One | | | |
| |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | |  | **Excellent** | **Good** | **Acceptable** | **Poor** | | **Additional Comments** | | | Attendance and Time Keeping |  |  |  |  | |  | | | Performance |  |  |  |  | |  | | | Quality of work |  |  |  |  | |  | | | Ability to cope under pressure |  |  |  |  | |  | | | Interaction with staff/clients |  |  |  |  | |  | | | Flexibility |  |  |  |  | |  | | | Reliability |  |  |  |  | |  | | | Teamwork |  |  |  |  | |  | | |  |  | | | | | | | | Improvements required? |  | | | | | | | | Development needs identified? |  | | | | | | | | *Please sign to confirm that all actions in the induction have been completed adequately and the above assessment is accurate.* | | | | | | | | | Signed by employee |  | | | | Date | |  | | Signed by Manager |  | | | | Date | |  | | | | |
| *Please comment on how the induction could be improved* | *3.* | |

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| --- | --- | --- | --- |
| **Name**: | | | **Start Date:** |
| End of Month One | | | |
| |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | |  | **Excellent** | **Good** | **Acceptable** | **Poor** | | **Additional Comments** | | | Attendance and Time Keeping |  |  |  |  | |  | | | Performance |  |  |  |  | |  | | | Quality of work |  |  |  |  | |  | | | Ability to cope under pressure |  |  |  |  | |  | | | Interaction with staff/clients |  |  |  |  | |  | | | Flexibility |  |  |  |  | |  | | | Reliability |  |  |  |  | |  | | | Teamwork |  |  |  |  | |  | | |  |  | | | | | | | | Improvements required? |  | | | | | | | | Development needs identified? |  | | | | | | | | *Please sign to confirm that all actions in the induction have been completed adequately and the above assessment is accurate.* | | | | | | | | | Signed by employee |  | | | | Date | |  | | Signed by Manager |  | | | | Date | |  | | | | |
| *Please comment on how the induction could be improved* | *3.* | | |

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| --- | --- | --- |
| **Name**: | | **Start Date:** |
| End of Month three | | |
| |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | |  | **Excellent** | **Good** | **Acceptable** | **Poor** | | **Additional Comments** | | | Attendance and Time Keeping |  |  |  |  | |  | | | Performance |  |  |  |  | |  | | | Quality of work |  |  |  |  | |  | | | Ability to cope under pressure |  |  |  |  | |  | | | Interaction with staff/clients |  |  |  |  | |  | | | Flexibility |  |  |  |  | |  | | | Reliability |  |  |  |  | |  | | | Teamwork |  |  |  |  | |  | | |  |  | | | | | | | | Improvements required? |  | | | | | | | | Development needs identified? |  | | | | | | | | *Please sign to confirm that all actions in the induction have been completed adequately and the above assessment is accurate.* | | | | | | | | | Signed by employee |  | | | | Date | |  | | Signed by Manager |  | | | | Date | |  | | | |
| *Please comment on how the induction could be improved* | *3* | | |