

Business Managers Handbook – Induction

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[Click here for the Induction Checklist](#)

Managers' Guide to Induction

1. Introduction

1. Induction can be seen as the last stage of the recruitment process ensuring the new recruit becomes an effective employee as soon as possible. This will apply to permanent and temporary staff, though the programme may be restricted for short-term engagements. Induction must also be arranged for people who are –
 - Internal appointments / promotion, although more restricted in scope.
 - Agency workers. Although not employees there remain some basic messages to communicate; health & safety, reporting absence, key organisational aims etc.

Further guidance is provided on the [agency](#) pages of the Source.

2. Key Principles

1. The following guidance notes set out the corporate minimum for induction; some departments will supplement these with local arrangements, e.g. introductions to their senior management team. Departmental HR teams can provide more details. Business units are responsible for designing the content and timescale of individual induction plans, based on –
 - The type of job, induction for a Social Worker and a Finance Officer will differ though their grade may be the same.
 - The level of job, for example Business Managers across the Council have some shared corporate responsibilities.
 - The job context.
 - Whether the person is a new recruit to local government, Southwark, or a transferred / promoted employee.
2. All new recruits must be provided with an [induction checklist](#) ; which is available on the Source. The checklist will be given to the employee on their first day of service. As details are completed the checklist will be filled in by either by the person or their Manager. **A final copy of the completed checklist will be placed on the employee's personal file within 4-6 weeks of commencement.** This will be the subject of regular audits.
3. Good induction need not be costly in time or money, planning is however key. Unless given time and assistance to settle down, the new person is unlikely to respond quickly and effectively to the demands of the job.
4. The plan should not be inflexible, but adapted to reflect the skills and experience of the new employee.
5. Induction is a key period for establishing the Council's objectives and cultural values. For example, the emphasis on customer care differs significantly between organisations and it is essential that Southwark's values and the impact on service delivery are established from day one.

6. Induction is a period of learning for the new employee, their manager and the team. Managing a diverse workforce requires supervisors to amend their styles to enhance an individual's contribution and may require teams to adapt and change.
7. Induction is the starting point of [performance management](#), not a separate function. During the induction period the work plan and training and development plan may require review and supervision/ appraisal may be more frequent.
8. On occasions when it becomes necessary, matters of capability and conduct should be dealt with under the Council's [capability](#) or [disciplinary](#) procedures, to secure improvements.

3. Supporting Induction

1. New employees will be required to attend a corporate induction programme. Where-ever practical this will be the employee's first days of employment. Where exceptions to attendance have been agreed with departmental management, suitable induction arrangements will still be required dependent on the role.
2. The corporate induction programme will provide employees some of the mandatory training required, but over the first few months of employment the employee will be required to attend specific training related to their role.
3. In addition where occupational assessment was used during recruitment, the information gained through this process may be used to inform the new employee and manager of person specific learning & development needs to be addressed.

4. Structure & Contributors

1. Induction can be broadly divided into the following -
 - Acquainting employees with the workplace and their colleagues.
 - Providing information about the organisation its aims, culture and structure.
 - Giving information on an individual's terms and conditions of employment.
 - Clarifying the requirements of the job, explaining the standards to be achieved within defined timescales, preparing a workplan.
 - Providing continuing support, preparing a training and development plan, monitoring performance.
2. The overall induction plan is the responsibility of the business manager, as nominated to supervisory managers. The key contributors are-
 - The supervisory manager who has responsibility for "performance management". In its broadest sense this is seen as; establishing aims and objectives, setting standards of work performance and conduct, work planning, training & development.

- The business unit team who provide information and support to the person. Exceptionally this may fall solely to the supervisory manager but this is unusual, normally other team members become involved in providing information on the physical layout of the workplace, meeting colleagues, advising on work tasks etc. People should therefore be advised and prepared to make their contribution.
- The HR Officer, or person responsible for staffing administration. This person plays an essential part in providing information, gaining key details from the new recruit and making arrangements for payment.
- Contributors external to the business unit. This may involve meeting colleague managers across the Council, outside contractors or organisations. If applicable, ensure colleagues know whom they are meeting, why, and the range of information expected to be covered.

5. Stages

1. The business unit may vary the timing of the plan, where practical.
2. In considering the timing ensure that the person -
 - Is not overloaded with too much information initially and that training is progressive.
 - Is given some work tasks at an early stage and is not being put ill at ease by being less than busy.

Before the Start date

3. The Recruitment/ HR officer sends out joining instructions with advice on documents that the new recruit should bring for verification. Before the start date the recruitment officer arranges an appointment with the person to verify and take copies of the documents.
4. The business unit must ensure that: -
 - a) An induction plan is drawn up by the business unit manager / line manager (or as nominated), participants in the induction programme are contacted and arrangements made on who will meet the newcomer on their first day etc.
 - b) Issues on accommodation are sorted - ensure the person will have a desk, a phone, a p.c. (with e-mail account), security/ID card, a locker (etc).

On First day of the Employment

5. The supervisory manager will work through the [checklist](#), introduce the newcomer to immediate colleagues, clarify attendance requirements, the proposed induction plan and domestic information. The employee will be provided with all relevant health & safety information for their responsibilities.

During the First week of the employment

6. **The new employee has the responsibility: -**
 - a) to book and/or attend the corporate induction programme.

b) to get familiarised with the key corporate information and HR policies and procedure. The guidance / links to key information are provided in the induction [checklist](#).

7. The supervisory manager will -

- a) Signpost / provide key corporate information.
- b) Signpost / provide information on specific HR policies and procedures i.e. codes of conduct / guidance notes / "rules" applicable to their post or area of work.
- c) Discuss corporate and business unit objectives and priorities.
- d) Discuss the job description and immediate work tasks.
- e) Make arrangements for supervision.

By the end of the First Month

8. The supervisory manager and the employee will have drawn up:

- a) A work plan, with challenging but achievable targets to year-end.
 - b) A learning & development plan. Where appropriate, the plan may also make use of information learnt during recruitment process (e.g. via occupational assessment) on potential areas of development.
 - c) A future programme of supervision and appraisal appropriate to the person and the post during the introductory months.
9. Mandatory and suggested training courses have either been attended or attendance is scheduled.
10. The employee has been introduced to a range of documents and tools that assist in operation of the role; e.g. Business Managers' handbook, departmental or job related procedures and guidance notes.
11. Induction meetings have been largely concluded. The new employee along with the line manager completes the induction checklist and submits a copy to Human Resources to be filed in their personnel record.
12. The employee has been introduced to a range of work tasks and immediate supervisory input is declining.

After the First Month

13. The level of support required will differ significantly between people and posts. For some, a particular work task may be annual or over an unspecified timescale and therefore may occur a significant period after commencement. Performance management provides an excellent vehicle for clarifying expectations, setting targets, monitoring performance and identifying learning and development needs. Please refer to the separate topic on [Performance Management](#) that gives further detail on plans (work plans, learning & development plans) as living documents that may be amended and reviewed, target setting and responding to individuals' performance.

6. Learning & Development

1. The importance of learning & development has been stressed in previous paragraphs and a plan should be prepared early in employment that reflects the business unit objectives and individual needs. The Council has identified a number of training activities that are either recommended or required for all staff within a specific group. The following list will be subject to change and may be supplemented by learning and development developed by a business unit or department. Unless specified the following are available through Organisational Development. Full details of each workshop and programme are available from the [Mylearning](#) Source web site, via the Source.

a) Recruitment

Training on the Council's Recruitment and Selection procedures is mandatory, prior to participation in recruitment panels. The type and duration of training will be dependent on previous recruitment experience and should be discussed with OD.

b) Customer Focus

Mandatory for all front line staff and managers of front line staff and services.

c) SAP

Contact your local SAP Departmental Representative for training arrangements.

d) Performance Management

For all staff and particularly those in supervisory positions.

e) Finance

A series of financial workshops have been developed for both Managers and Support Staff, which set out how the financial responsibilities are managed within the Council, please refer to either, OD or your Departmental Finance Manager for more details.

f) HR Procedures

OD will provide a regular course to introduce supervisors and business managers to several key HR procedures; sickness management, discipline, capability, staff complaints.

g) Risk Assessment

A workshop "Risk Assessment for Business Managers and Direct Reports" has been developed which ensures competence in the implementation of risk assessment in accordance with Southwark's procedures. This is mandatory training.

h) Equalities & Diversity

ODs equalities and diversity programme for managers is mandatory training. All staff should be encouraged to attend the equality training for staff; this is also mandatory for staff in front facing services. E-learning materials on [equalities and diversity](#) are also available via [MyLearning](#) Source.