Staff Induction Checklist For: New Managers

For: New staff taking on leadership, management, supervisor and team leader roles, anyone who has responsibility for other members of staff

This checklist is to be used in addition to the generic staff induction checklist

University *of* Exeter

Name of Inductee:	**Job Title:**
Line Manager:	**Contact Details:**
Induction Facilitator:	**Contacts Details:**
Start Date:	

Onboarding Checklist

For staff in leadership, management, supervisory and team leader roles:

- This checklist list is to be completed **in addition** to the generic staff induction checklist.

- It should be completed where new members of staff are embarking on a role that has leadership, management, supervisory, team leader or staff oversight responsibilities.

- Please talk through all the relevant areas and initial the 'Confirm Discussion' column as required (person being inducted is to initial). Please place N/A next to any areas not relevant to the work area indicating that this point has not been discussed.

- Once complete both the manager and member of staff being inducted must sign and date the form. This can be done electronically.

- Health and Safety: If you work in an environment that requires more specific safety considerations such as laboratories, workshops or use specialist equipment you must visit the Health and Safety web pages or contact the Safety Team for guidance about additional induction requirements. A note should be made on this form of any additional discussions or training completed.

As a manager there are areas that you should discuss in order to understand the University's approach and processes. It is suggested that you cover the following, some of which have mandatory elements, with your own manager as part of your onboarding:

Induction Area (incl links)	Requirement / Discussion points	Suggested lead	Confirm discussion (initial or N/A)
Managers, Supervisors and Team Leaders – key information	As a leader, manager, supervisor or team leader you are vital to the running of the University and provide an important role model to the staff you oversee. The Managers, Supervisors and Team Leaders – key information pages provide essential information, from the beginning of the staff recruitment journey through day to day management and what to do if a member of staff is leaving your supervision. Spend some time looking through the information and then discuss any questions you have with your manager. If you have members of the military community in your team you will also need to familiarise yourself with the Armed Forces Covenant. The Human Resources team are also here to support you and answer any queries.	LM	
Discussion with and about staff members	Where possible discuss the current team in order to understand their roles, responsibilities and any wellbeing considerations. Book 1:1 sessions with each member of staff in order to find out the detail about and to get to know each person.	LM	
Managing Probation	Discuss your role in the probation process for new staff and understand the procedure involved.	LM	
Conducting Performance and Development reviews	PDR conversations are a great opportunity to pause, reflect and begin to think about the next steps, as well as making time to consider the wellbeing of your staff and to recognise their current and future workload. Discuss the approaches and options available to you as a manager for conducting and recording reviews.	LM	
Finance Services	Discuss any areas of finance responsibility related to your managerial role.	LM	
Onboarding and Induction	You play a vital role in the onboarding of new staff members. It is key that managers are aware of their responsibilities in this process in order to give new joiners a positive experience when they start work. There is loads of advice, guidance and support available to help you through this process: Onboarding Advice to Managers	LM	
Staff safety, health and wellbeing	Discuss your role in supporting your staff and creating a positive working environment. This might include your responsibilities around safety, sustainability and equality, diversity & inclusion. Discover groups that can support you and your staff such as focus/support groups including those for parents and carers, LGBTQ+, international staff, research networks, BME, disabled network, Armed Forces community and many more: see the Staff Networks section in Further signposting	LM	

Additional Training: The following are suggested for all managers, supervisors and team leaders. Some of the sessions provide information about the processes and procedures specific to the University, while others offer wider development opportunities available to grow your leadership and management skills.

Induction Area	Requirement / Discussion points	Suggested lead	Confirm discussion (initial or N/A)
Exeter Leader	Access a number of courses and learning pathways that can assist you to develop in your role. Whether new to management and leadership or someone with experience, the University has development opportunities for all levels. Includes: Managing people, Leadership skills , Engage series (Academic roles), Tools and Resources and more.	LM	
Additional Mandatory Training	Confirm any additional requirements for your role beyond the 'All Staff' mandatory courses. Areas might include Corporate Conscience, PDR Reviewer training, Prevent courses, recruitment and selection. Visit the table on the Mandatory Training pages to view the options.	LM	
Performance and Development Reviews	All managers are required to complete the PDR training relevant to your area. Follow the link below in order to book a session: • PDR Reviewer Training for Academic Colleagues • PDR Reviewer Training for Reviewers of Research Staff • PDR Reviewers Training for Professional Services Colleagues	LM	
Leadership skills – The Leadership Difference Programme	All managers and leaders are strongly encouraged to attend our core leadership development programme for Academic and Professional Services leaders. The programme promotes a professional and supportive leadership community and recognises the role of leadership in enabling our institutional ambitions and embedding our values.		
Senior Academic Leader Programme	The SAL programme aims to help colleagues understand the role (especially with regards to people management, mentoring, reviewing), to encourage effective people management through consistent management practices and to learn from each other, share experiences and provide peer support.		
Coaching and Mentoring	The University encourages a culture of coaching and mentoring, whether as part of your management or leadership style, when having PDR conversations or using as a development tool. You may wish to become a mentor / coach or to request one for your own development. The University offers development opportunities in both Coaching and Mentoring		

Recruitment and Selection	If your role requires you to recruit staff you must complete the Recruitment and Selection training on LearnUpon in order to sit on or run a panel. Self-enrol via the catalogue.		
Supporting the Wellbeing of your Team	Managers are strongly encouraged to complete the 'Supporting the mental wellbeing of your team' course which can be accessed via self-enrolment on LearnUpon.		

Additional discussions:

Note below additional areas you might wish to cover, they may be specific to your role, location or personal needs and concerns. Look back through the Managers, Supervisors and Team Leaders – key information to confirm any areas you might be unsure about. You may want to also note useful contacts.

Induction Area/Contact	Requirement / Discussion Point / Contact Details	Discussed with LM or IF?

Required Actions:

Please compete the table below to identify any actions or training requirements that need to be taken forward:

Action / Training	Date to be completed:	Signed off once complete:
Meet the team, book 1:1s with team members		

Sign off:

Staff member name, signature and date	
Manager /person carrying out induction name, signature and date	