## Managers Guide for Onboarding and Induction

To help get your new, transferring or returning colleague off to a great start, this guide is to help you to prepare a comprehensive and tailored induction and onboarding experience. It should be adapted to fit with the needs of the staff member and the team they are joining so it might be appropriate for you to delegate certain activities to other members of the team and/or their buddy. It also highlights your responsibility as a manager in the process.

## What is induction?

## Induction is a structured programme to provide new starters or those moving or returning with the information and support to help them settle into their role and the organisation effectively. It refers to the process of adjustment and acclimatisation into their job and working environment.

## What is onboarding?

This is a broader term, which covers the whole process from someone being recruited or returning to work, through to understanding how the Parliament works and getting up to speed in their job.

**What does induction and onboarding achieve?**

Develops relationships

* Get to know key people quickly
* Know what internal and external networks are essential

Enhance performance

* Provide guidance and help they need for them to be effective in their role as soon as possible
* Expectations are established and discussed from the outset and regularly

Understand the Scottish Parliament

* Build on existing knowledge and develop their Parliamentary and Political awareness and the culture within which they will be working

Remove barriers

* Anything that can create a negative experience needs to be thought of and actioned
* Reduces the anxiety of the transition into a new workplace or office

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| **Top tips throughout the induction and onboarding process** |
| **Remember one size doesn’t fit all**   * Consider the needs of each new employee, returner, or mover and their role * A good induction should be tailored - adapt your approach if necessary * You may need to make adjustments to the induction programme, as well as the role, to support your new start if they have a disability, so provide the employee with the chance to communicate about this * This supportive process should continue into ongoing 1-2-1’s |
| **Think beyond day 1**   * Remember that the first 90 days in a new role are crucial for long-term success. |
| **Help people build good networks**  You can help by:   * Setting up meetings with key people, e.g. subject matter experts, office heads and experienced team members * Identifying important external contacts, clients and suppliers |
| **Enable colleagues to express any concerns**  As part of your regular catch ups, ask them:   * Do they have everything they need to perform their role? * Do they need specific training? * Have they met key people in the organisation? * Address problems as early as possible. |

## Manager’s Onboarding Checklist and Timelines

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| **5 - 6 weeks before** | **✔️ Completed/ Notes** |
| * New start and manager meet in Holyrood to complete security forms and scan passport and qualifications (when we’re back in the building) * New start and manager meet to discuss adjustment passport if required |  |
| **3 - 4 weeks before** | **✔️ Completed/ Notes** |
| * Start date confirmed between new start/ returner and manager * Communicate start date to People and Culture Office, (who’ll send you the induction email and the equipment request template) |  |
| **1 - 2 weeks before start date** | **✔️ Completed/**  **Notes** |
| * Agree with your HR Officer when and where all 3 of you will meet on the first day, either virtually or at Holyrood. * Send an email to team members saying who will be starting/ returning and when. * Arrange a buddy * Plan the induction by working out what, when and who in the organisation will get involved will help maintain the positivity of the team member. * Prepare a comprehensive induction plan for their first 2-4 weeks using this guide and [Induction and Probation guidance](https://www.spstaffhandbook.com/induction). * Arrange for key meetings and pull together a 2-4 week plan of activities to cover any online training and introduction to job role * Familiarise yourself with [probation](https://www.spstaffhandbook.com/probation) as part of the performance management approach; all legal compliance training has to be completed as one of the requirements of completing probation * Arrange a tour of the building via Visitor Services for their first week (if working in Holyrood) |  |
| **Office**   * If they are working in Holyrood, make sure the new employee’s work station or space is ready and working with all the equipment they need and cleared of anything they won’t * Desk/chair and lockable pedestal should be arranged if needed * Stationary basics should be provided |  |
| **IT**   * Check IT equipment been issued to your new start and IT log on details have been sent to you |  |

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| **Day 1** | **✔️ Completed/ Comments** | |
| **Avoid information overload.**  Rememberto take things slowly**,** let people observe how things are done,andhave some straightforward tasks ready to help build confidence. | | |
| **Welcome:** If home working, then IT equipment will be sent out and as manager, you will be given the login details. You should arrange a time to phone your new start and provide them with these details.  Your HR advisor and you will welcome them (via Teams if home working).  Arrange a time to pick up their pass early on their first day (if working from Holyrood)**.** | |  |
| **Make introductions:** introduce them to the team they will be working with. Then, introduce them to the Office Head and colleagues in other teams or departments they need to know. | |  |
| **Arrange a meeting with the buddy:** Introduce the recruit to their ‘buddy’ and give them a short time to talk together. | |  |
| **Offer some company during breaks:** They may want some time alone during breaks or they might need to check in with friends or family curious to hear about their first day. However, it can be a welcoming and reassuring gesture to invite your staff member for a cup of tea, or something to eat, if you’re working at Holyrood. If home working, check if they would like a virtual ‘coffee break’ with you. | |  |
| **Health, Safety and Well Being**  **Our working environment**  Whether a new member of staff, someone is returning or moving role it is essential to ensure a healthy and safe working environment.  **As an employer we must…**  [outline any health and safety](https://www.parliament.scot/intranet/12468.aspx) precautions they must take to protect them from harm and training needed to do their job safely.   * [Start to develop a wellbeing plan](https://archive2021.parliament.scot/intranet/116420.aspx) * Your staff member should complete a [home working self-assessment and request form](https://coronavirus-staff.info/working-from-home#equipment). | | |
| **Induction and legal compliance training:**  Your new start will have access to resources which are essential (including mandatory training) as part of their first few months and they can start to explore these in Learning Pool under ‘My Induction’. | |  |
| **Show them around the workplace:** If working in Holyrood, let them know where they can find practical facilities like the toilets, washing and first aid facilities, and drinking water. This is a small part of looking after their health and safety and must happen on day one. | |  |
| **Provide an overview of pay, hours and holidays:** Show them how to use [E-HR](http://www.scottish.parliament.uk/intranet/31010.aspx) and howtoupdate their diversity information. This is information is very important to us in planning for a diverse an inclusive workplace.  Explain TRS and what it’s used for including, [breaks, working hours, flexi/ annual leave and absence recording.](https://www.spstaffhandbook.com/your-pay-hours-holidays) | |  |
| **Outline Security arrangements:** Explain the importance of following our [security processes](https://www.parliament.scot/intranet/12469.aspx) for everyone who uses the building. | |  |
| **Essential documents, polices and workplace essentials** | | |
| [Getting the most from the staff handbook:](https://www.spstaffhandbook.com/) It brings together the information needed for how your team member can contribute to the Parliament, and what can be expected in return.  It’s important they read and understand the content of this handbook and refer to it when needed throughout their time with us**.**  Spend some time going through the [Staff Handbook](https://www.spstaffhandbook.com/respect-and-dignity) and ensure the member of staff has read and understood key policies. If they are returning, ensure they are aware of any key changes or new policies. In particular, you should cover:   * [Contract and probation](https://www.spstaffhandbook.com/probation) * [Code of conduct](https://www.spstaffhandbook.com/reputation-integrity) * [Diversity and Inclusion](https://www.spstaffhandbook.com/diversity-inclusion) and our Networks * [Culture of Respect](https://www.spstaffhandbook.com/respect-and-dignity) including sexual harassment * [Use of social media](https://www.spstaffhandbook.com/it-and-social-media) | |  |
| **Using our IT systems**   * You should cover the key software we use and gauge an understanding of potential development needs i.e. what they have and haven’t used before * SharePoint and our records management approach | |  |

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| **First month** | **✔️ completed** |
| **Introduction to the Scottish Parliament**  Your team member will already have some of this knowledge from the recruitment process, but it will be helpful to build on this to enable their Parliamentary and Political awareness to be developed. You could cover:   * The History of the Parliament (this can be covered in a Visitor Services tour) * [Our purpose, strategy and values](https://www.spstaffhandbook.com/values) * A visit to the Chamber and possibly observing FMQ’s * For returners you should provide a key overview of what has changed strategically and operationally and how this impacts their role and your office |  |
| [Performance management approach](https://www.spstaffhandbook.com/managing-for-excellence)  Organise catch ups for the next few months. Things to remember are:   * Meeting frequency * Format * Feedback style * What are the key objectives for the first 3 months and what is expected in order to complete their probation successfully |  |
| **Learning & Development**   * You can discuss any development needs with People and Culture by contacting [Michael.Reid@parliament.scot](mailto:Michael.Reid@parliament.scot). |  |
| **Help them get to know their colleagues**  Bonding with colleagues helps new employees feel part of the team. It also improves engagement. You can encourage this by:   * Taking your new employee out for lunch or coffee with the team * Inviting them to team social events * Create a good informal working climate * Take them through the [Organisation chart](https://archive2021.parliament.scot/abouttheparliament/12441.aspx) * You should explain the immediate and wider team and how these fit in with the wider organisation structure * The [Diversity Staff Networks](https://www.spstaffhandbook.com/diversity-inclusion) are a great way to meet colleagues from the wider organisation. |  |
| **Regular catch ups/ team communications**  Send any team meeting times/ dates and explain purpose |  |
| **Objectives and checking in:** You should agree how regularly you will be catching up to check in on how your team member is settling in, how they are performing against their objectives and any additional development they might need. |  |
| **Probation progression**  At the end of 4 weeks you should:   * Arrange an informal catch up to review how they adjusting to their role, and whether they have any particular development needs or other requirements. |  |
| **Achieving and maintaining good health and wellbeing:** It is essential to us that we support our staff to do this. We have [trade unions,](https://www.spstaffhandbook.com/listening-to-you) [D&I networks](https://www.spstaffhandbook.com/diversity-inclusion), [resources and benefits](https://www.spstaffhandbook.com/healthandwellbeing) that are available. Ensuring regular catch ups will go some way to helping your staff member settle in and be effective sooner.   * Complete wellbeing plan, and review at regular intervals. |  |

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| **At three months** | **✔️ completed** |
| **Review and next 3 months**  Your team member is now 3 months through their [probationary period](https://www.spstaffhandbook.com/probation) or 3 months back in role. It is helpful to ensure that you are both have a review of their performance and see how they are settling in:   * Check in how they are progressing with the induction activities in Learning Pool * Revisit objectives, their learning and development plan and progress against probationary requirements * Looking to the next three months, any new work objectives, and any experience, development needs to support probationary period, personal and professional development. |  |

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| **At six months** | **✔️ completed** |
| **Review of onboarding and probation next steps**   * You should confirm with your HR Officer that they have passed their probationary period * People & Culture will be in touch with you and your new start/ returner to review the onboarding experience * Look to the next six months, any discuss new work objectives, and any experience or development needs |  |