**Library Induction Toolkit: for Managers**

|  |  |
| --- | --- |
| New colleague’s name  |   |
| Job title  |   |
| Team  |   |
| Start date  |   |
| Induction period |  |
| Line manager |   |

Library managers should use this toolkit to plan onboarding and training activities for new staff. The toolkit will help you:

* Provide a warm welcome to the new colleague
* Ensure all University induction requirements are met
* Ensure activities are planned and scheduled to provide an engaging and structured introduction to the team, Library and the colleague’s work
* Ensure that onboarding activities and training are aligned with expectations and goals for the colleague’s ‘probation’ or induction period\*

This toolkit is designed to support managers before and during the first few weeks of a new colleague’s start and to support new colleagues during their induction period. Some elements may be better suited to later stages and more detailed training plans may be required for use after the initial induction period. Managers should check progress regularly and offer additional training and support if needed.

The University’s [Welcome to the University of Manchester Guide](https://rise.articulate.com/share/V-IKr-kvD4hmd2bkZfUhhivhbqOQD5e3#/) included in new staff contract emails, provides an overview of University benefits, wellbeing and development opportunities. It is recommended to include this within your induction materials and training. The University will automatically send a quick 8 week and 12 month survey to help inform the new starter experience.

**\*Probation period**

Most posts at the University have probationary periods varying by job grade. Full details can be found in the [New Staff area on StaffNet](https://www.staffnet.manchester.ac.uk/people-and-od/new-staff/probation/). As the the term ‘probation’ can sound daunting, we prefer to use ‘induction period’ in the Library. Please note that the standard term ‘probation period’ may be used in University documents.

**Note:** For current University employees moving to a new role, there is typically no probation period. For redeployees, there is no probation period unless a trial period, (usually 4 weeks to 6 months), has been agreed during the offer stage. Line Managers will be automatically informed of [probationary reviews](https://www.staffnet.manchester.ac.uk/news/display/?id=31108).

The toolkit comprises five documents, recommended for preparation and use in the following order:

|  |  |  |  |
| --- | --- | --- | --- |
| # | Toolkit item | When to complete | Description |
| 1 | [New starter actions](#_New_starter_actions_1) | Post-interview, on acceptance of the initial, informal offer of a post | Essential actions a manager must take to set up HR, IT and other key University systems. |
| 2 | [Induction goals and expectations](#_Probation_goals_and)  | A few weeks before the new starter joins the Library | Use to establish expectations and goals for a new colleague’s induction period and form the basis for onboarding activities, training and work in the first month/s in post. Add to the new colleague’s induction toolkit document and share with them in their first week. |
| 3 | [Training and development plan](#_Training_and_development_1) | A few weeks before the new starter joins the Library | Use to identify training and development requirements for the first months in post, based on understanding of induction goals and expectations. Add to the new colleague’s induction toolkit document and share with them in their first week. |
| 4 | [Onboarding plan](#_Onboarding_plan_1)Including [example induction schedule](#_Template:_induction_schedule) | At least a week before the new starter joins the Library | Use to plan onboarding activities for new starters’ first month in post and ensure their first weeks are well-structured, introducing them to relevant information, colleagues and training. Add to the new colleague’s induction toolkit document and share with them in their first week. |
| 5 | [Induction checklist](#_Induction_checklist) | Included on new colleague’s induction toolkit, which should be shared with them on their first day | The University’s official induction checklist containing all requirements related to HR, IT access and training, with any role specific activities included. This checklist is included in the new colleague’s induction toolkit, share with them in their first week. New colleagues should take ownership of the checklist, working to complete all tasks either independently or in discussion with their line manager. The line manager should clarify which activities will be facilitated and which will be self-directed.  |

# **New starter actions**

|  |  |  |
| --- | --- | --- |
| Action | Details | Status |
| Confirm important details with new colleague | The Library Office will complete a New Appointment Form (NAF). Email uml.hr@manchester.ac.uk. The following details should be provided to be included on the NAF.* Date of birth
* Nationality
* Details of right to work in UK, if required
* Preferred start date

It is advisable to establish/request from the new colleague:* Their pronouns
* A headshot photo for the intranet (can provide when they begin, but useful to mention it will be needed)
* If they have been a student or an employee at the University in the past, as this can affect IT account activation and set-up
 | [ ] [ ] [ ]  |
| Request IT equipment | Log into the IT support portal (Ivanti) and complete a [Laptop or Desktop Reques](https://manchester.saasiteu.com/Modules/SelfService/?NoDefaultProvider=True#serviceCatalog/request/452C482A17EF411198546EA9C35A9BE3)t form (state you are a library member of staff to triage the form to the Library IT team).It is advisable to complete this form as soon as possible to avoid delays sourcing IT equipment. The Library Digital Systems team recommend placing a request for standard equipment such as a laptop as soon as a post is advertised – there's no need to wait until a candidate is offered the post. If anything changes and the kit is no longer needed it will be redistributed. **Please note:** For specialist kit contact and discuss with the Library’s Digital Systems team.You will need to use your own details (name, username etc) for the recipient, as new starters’ IT account details will not be set up prior to their start date | [ ]  |
| Confirm receipt of formal offer letter | It is advisable to remain in contact with the new colleague to check they have received their formal letter of offer for their new role.Liaise with the Library Office, who will chase with P&OD, if there are delays. Contact uml.hr@manchester.ac.uk  |[ ]
| Inform the team (& plan to inform wider Library) | Let the team know the outcome of the interview process including successful candidate’s name; start date; who their line manager will be and their primary focus. You may also wish to reference the new starter’s previous role or experience.This update can be reused and adapted for the Library Update piece introducing the new colleague once started. | [ ] [ ]  |

# **Induction goals and expectations**

*[Manager should prepare this in Manager’s induction toolkit and add to new colleague’s toolkit when finalised]*

This section of the toolkit is intended to support the establishment of expectations and goals for a new colleague’s induction period. These goals and expectations will inform the planning of onboarding activities, training and work in the first month/s in post. Some goals may be carried over to be worked on in the post-induction period, at the line manager’s discretion. Line managers should bear in mind the official University guidance related to ‘probation periods’, even though this toolkit steers away from using the term ‘probation’ to avoid undue worry on the part of the new colleague. Use or adapt the example below to help you outline expectations and goals.

**Induction month 1**

|  |  |  |  |
| --- | --- | --- | --- |
| **Element of role***(This can be taken from, but is not limited to, the job description role and person specification)* | **Expectations***(What does this translate to in terms of performing/delivering the role?)* | **Goals***(By the end of this induction month, I will be able to…)* | **Completed?***(Record with line manager’s initials and date of completion, or plan if agreed to roll over post-induction)* |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Induction month 2**

|  |  |  |  |
| --- | --- | --- | --- |
| Element of role | Expectations | Goals | Completed? |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

*Add further induction months as required*

# **Training and development plan**

*[Manager should prepare this in Manager’s induction toolkit and add to new colleague’s toolkit]*

This section of the toolkit is intended to support the identification of training and development requirements for your new colleague in their first months in post, based on the agreed [induction goals and expectations](#_Induction_goals_and), as well as to ensure completion of mandatory University training.

|  |  |  |
| --- | --- | --- |
| Identify any training needs below, review together with agreed actions to address them | Target completion date | Review Date |
| **University Essential Training (Mandatory)**There are 8 mandatory modules to complete. These are available via one online course. Details of how to sign up are available on StaffNet: <https://www.staffnet.manchester.ac.uk/talent-development/essentials>* Health & Safety
* Fire Awareness for All
* Office Safety at UoM
* Data Protection & Cyber Security
* Diversity in the Workplace
* Unconscious Bias
* Disability Equity
* Sexual Harassment

The following training is also mandatory for all Library staff:* [LAOD150 Hidden Disabilities Sunflower Scheme](https://online.manchester.ac.uk/webapps/blackboard/content/listContent.jsp?course_id=_70844_1&content_id=_13548871_1) (online training course) see [further information](https://hdsunflower.com/)
* [TWP01 Widening Participation for Staff](https://app.manchester.ac.uk/training/profile.aspx?unitid=9382&parentId=183&returnId=183&returntxt=Return+To+Search&returnQs=%3fterm%3dwidening%26org%3d0%26typeId%3d2) (online training course)
* [Register of Interests (guidance)](https://www.staffnet.manchester.ac.uk/governance/register-of-interests/) (Grade 6 or above)
 |  |  |
| **Specific to the Role***Add any training requirements specific to the role* |  |  |
| **Organisation skills, Administrative, IT** * [Microsoft 365 Resources (All-Library-Staff Teams Channel)](https://teams.microsoft.com/l/channel/19%3Af6855e4029fa412fa3cd4acbe1f1f017%40thread.tacv2/M365%2520Digital%2520Champions?groupId=84639869-2453-4991-a453-1bef5cd2380b&tenantId=c152cb07-614e-4abb-818a-f035cfa91a77)
* [University Microsoft 365 Support Resources](https://www.staffnet.manchester.ac.uk/staff-learning-and-development/learning-pathways/professional-and-technical-development/digital-skills/m365/)
 |  |  |
| **Leadership, Management/Supervisory** * [P&DR Reviewer Guidance](https://app.manchester.ac.uk/training/profile.aspx?unitid=8575&parentId=4) (online training) - If applicable to colleague’s role

**Staff Management Forum (SMF)**New managers are automatically part of the Staff Management Forum networking group. Please contact Pamela Morris to ensure they are added to the mailing list.* [Staff Management Forum – Library StaffNet](https://www.staffnet.manchester.ac.uk/library/working-here/staff-groups/staff-management-forum/)
 |  |  |

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| --- | --- | --- |
| **Health and Safety (In addition to Mandatory University Training)**All staff to make themselves aware of:* [Library Health and Safety practices and procedures](https://www.staffnet.manchester.ac.uk/library/resources/incident-management/health-and-safety/)

All staff Grade 5 or higher must complete: * [TLCF101E Fire Marshalls Training (eLearning)](https://online.manchester.ac.uk/webapps/blackboard/execute/courseMain?course_id=_64080_1)

In addition, all managers are required to complete the following eLearning:[THS1E University Health & Safety induction (eLearning)](https://app.manchester.ac.uk/training/profile.aspx?unitid=4721&parentId=4) [TLCO300 Principles of Risk Assessments (eLearning)](https://app.manchester.ac.uk/training/profile.aspx?unitid=7722&parentId=4) |  |  |
| **Other*** [EDI terminology and glossary guide](https://livemanchesterac.sharepoint.com/sites/UOM-LIB-All-Library-Staff/Shared%20Documents/Equity%2C%20Diversity%20and%20Inclusion/EDI%20terminology%20and%20glossary%20guide.pdf)
* [Library Get Started](https://www.library.manchester.ac.uk/get-started/) resources
* [An Introduction to Higher Education](https://www.training.itservices.manchester.ac.uk/staff/SLD/IntroductionToHigherEducation/content/index.html#/) (online training course)
* [TPDR02E Getting the best from your P&DR](https://app.manchester.ac.uk/training/profile.aspx?unitid=7097&parentId=4) (online training course)
* [TIC3 New Colleague Campus Tours](https://app.manchester.ac.uk/training/profile.aspx?unitid=10016&parentId=183&returnId=183&returntxt=Return%20To%20Search&returnQs=%3fterm%3dCampu%26org%3d0%26typeId%3d2)
 |  |  |
| **Working relationships across the Library**Managers are encouraged to explore ways to help new colleagues build relationships with colleagues beyond their core team and across the Library. This can be challenging, especially with hybrid working. The Induction Checklist section of the new colleague’s toolkit includes prompts to meet key colleagues, but managers should discuss with the new colleague their preferences for connecting with others. Options could include:* Provision of a detailed explanation of different teams and their roles
* Facilitating introductory meetings with colleagues from other teams
* Signposting to the ‘[Working here](https://www.staffnet.manchester.ac.uk/library/working-here/)’ section of the Library intranet, with its links to staff groups and wellbeing support and activities

A consultative, tailored approach is recommended here, as new colleagues will vary in their levels of interest and urgency in getting to know wider Library colleagues, and their preferred means of doing this. |  |  |

# **Onboarding plan**

This element of the toolkit is intended to support the planning of onboarding activities for your new colleague’s first month in post, and ensure that their first weeks are well-structured, introducing them to relevant information, colleagues and training.

* The [onboarding plan](#_Onboarding_plan_1) outlines actions and activities that the manager is recommended to take or arrange before the colleague begins; on their first day; and for their first two weeks.
* The example [induction schedule template](#_Template:_induction_schedule), can be adapted and populated based on the needs of your new starter. Once finalised, the induction schedule can be added to the new colleague’s induction document and shared with them prior to or during in their first day/week. If you are planning to task the new colleague with setting up meetings with colleagues, you can encourage them to add these to their induction schedule in their induction document.

## **Onboarding plan**

### **Before colleague starts**

|  |  |  |  |
| --- | --- | --- | --- |
| Activity  | Responsible  | Details | Status  |
| Agree working location for first day (on campus or remote working)If first day will take place on campus, book a space for new colleague | Line manager | Line manager may consider meeting in a location separate from usual day-to-day work, as a pleasant ice-breaker and introduction to the University. Managers should be mindful of individual needs. | [ ]  |
| Agree time and location to meet new colleague on first day (or schedule Zoom meeting if first day will be remote) | Line manager | If meeting remotely, Zoom is recommended over Teams in case of delay to University IT account set-up. |[ ]
| Share induction toolkit document prepared for your new starter with them a couple of days before their first day  | Line manager | Reassure the new colleague that this is for information only before they begin; all aspects of the toolkit will be explained, and time arranged to complete it, once they begin work |[ ]
| Arrange a buddy for the new starter  | Line manager | This could be an existing colleague in a comparable role in the team (not their line manager) who will meet with new starter and be a point of contact for questions etc |[ ]

### **First day**

|  |  |  |  |
| --- | --- | --- | --- |
| Activity  | Responsible  | Details | Status  |
| Plan for an offline day. It can take [up to 24 hours for new colleagues to be able to activate their IT account](https://www.staffnet.manchester.ac.uk/people-and-od/new-staff/first-day-essentials/) after visiting HR. It is best to assume your new colleague will not have IT access for their first day. | Line manager | The first day could include:* In-person or Zoom meetings (using the colleague’s personal email address for the Zoom invitation)
* Providing a tour of relevant buildings and spaces
* Providing printed material for the new colleague to read without access to a computer
* Sending digital material such as documents to read to the colleague’s personal email address, if they were willing and able to use a personal device
 |[ ]
| Provide workstation for colleague to use as a base on first day | Line manager | Including access to a locker or other suitable storage if requiredColleague is unlikely to be able to set up and access IT account for 24 hours after collecting staff ID card, so will either need to work offline, or work on their own device if they’re willing to do this – please ensure their workstation can accommodate their needs.  |[ ]
| Welcome meeting with line manager  | Line manager | Welcome & explanation of role and how this fits in with wider team services/work Who’s who – within the immediate team, and other key contactsProvide and explain all induction documents (i.e. documents that form this toolkit)  |  [ ]  |
| Key activities detailed on [Induction checklist](#_Induction_checklist), including visit HR and tour of key Library sites (if working on campus) | Line manager/ buddy/ colleague | Inform HR if colleague was a student or previous employee of the University – see [Troubleshooting](#_IT_account) |[ ]
| Discuss Equality, Diversity and Inclusion, and accessibility, and note any specific needs or requirements that the new colleague has. | Line manager | Share information on accessibility support and tools which are available to all staff, and relevant staff networks.[https://www.staffnet.manchester.ac.uk/disabled-staff-support](https://www.staffnet.manchester.ac.uk/disabled-staff-support/)<https://www.staffnet.manchester.ac.uk/equality-and-diversity> |[ ]
| Arrange access to key systems  | Line manager | All relevant Outlook mailboxes * Team mailing list
* Microsoft Teams and relevant channels and chats
* Microsoft Sharepoint
* (other team-specific systems, e.g. Pure, Alma)
 |[ ]
| Arrange access to buildings/rooms if swipe card access is required (e.g. AGLC staff spaces) | Line manager | Sentry gates at Library sites will automatically work once colleague has collected their staff card. Contact Access Control to arrange access to:* AGLC staff areas
* Farnie Room
* Main Library Blue Basement (toilets)
* Crawford House Library Staff Hub

Email: accesscontrol@manchester.ac.ukProvide colleague’s name; ID number; list of buildings and spaces where access is required.Share door codes and toilets/break areas with colleague: <https://www.staffnet.manchester.ac.uk/library/resources/spaces/room-bookings/>  | [ ] [ ] [ ]  |
| Invite colleague to regular team and departmental meetings via Outlook | Line manager |  |[ ]
| Introduce team members with whom new colleague will work closely | Line manager/new starter /buddy | Doesn’t have to happen on the first day – can happen throughout first few weeksLine manager may wish to task the new colleague to contact relevant colleagues for introductory meetings. This helps to build confidence using Outlook and communicating with colleagues. The line manager should inform colleagues in advance if this is planned, and provide guidance and support to the new starter, e.g. introducing themselves; explaining the purpose of the meeting; etiquette on requesting a meeting etc |[ ]
| Consider providing a reading list or similar bundle of relevant contextual information, for new colleague to work through in between other onboarding tasksExample from Research Services:[Suggested reading list](https://docs.google.com/document/d/15e8D6abhPmPBNv17bABAPWctUvpot_y7gI9PUTZVUqY/edit)  | Self-directed  | Line manager should make clear which work is intended to be self-directedWork through suggested resources to broaden understanding of work and context Note any questions or interesting observations for discussion at end of week meeting  |  [ ]  |

**First week**

|  |  |  |  |
| --- | --- | --- | --- |
| Activity  | Responsible  | Details | Status  |
| Plan to support IT account set-up on the colleague’s second working day. Can take [up to 24 hours for new colleagues to be able to activate their IT account](https://www.staffnet.manchester.ac.uk/people-and-od/new-staff/first-day-essentials/) after visiting HR. | Line manager | [IT account activation instructions](https://www.itservices.manchester.ac.uk/help/new-staff/) |[ ]
| Provide guidance on Display Screen Equipment assessment and how to arrange adjustments to workstation or equipment if required | Line manager | Guidance on the DSE assessment process and providing DSE related equipment: <https://documents.manchester.ac.uk/protected/display.aspx?DocID=56930>  |[ ]
| Discussion of role, including expectations and goals for induction period, and training and development plan | Line manager |   |[ ]
| Meetings with key colleagues | Line manager/new starter  | See [Induction checklist](#_Induction_checklist)Book these throughout first few weeks or task the new colleague with booking these as a confidence-building task – see suggestion in ‘First Day’ above |[ ]
| Support colleague to work through induction checklist and to continue to do this over first few weeks | Line manager | Make clear what work is intended to be self-directed |[ ]
| Begin training | Line manager | Schedule this and add details to your induction schedule ([example](#_Example/template:_induction_schedul)), including details of training; who colleague will work with; times and dates; expectations |[ ]
| Self-directed reading, reflection and training | Self-directed | Using induction documents as a prompt, as well as a team-specific reading list if provided |[ ]
| Direct to bespoke M365 library resources via M365 Digital champions channel in the All-Staff Team area.  | Line Manager Self Directed | The University also offers several virtual sessions on various M365 topics bookable through the Staff Training and Development catalogue.  |[ ]
| End of week meeting  | Line manager | Check in – how has the week gone? Any questions, concerns, things to discuss? Consider next steps on induction checklist, induction expectations and goals, and training and development plans. Provide Summary of plans for next week  |[ ]

### **Second week onwards**

|  |  |  |  |
| --- | --- | --- | --- |
| Activity  | Responsible  | Details | Status  |
| Meetings with key colleagues | Line manager/new starter themselves | See [Induction checklist](#_Induction_checklist)Book these in throughout first few weeks to allow build-up of contextual understanding and building of relationships, or task new colleague to do this (see First Day, above) |[ ]
| Colleague to continue to work through induction checklist, with support from line manager  | Self-directed |  |[ ]
| Continue training | Self-directed | Schedule this and add details to your induction schedule ([example](#_Template:_induction_schedule)), including details of training; who colleague will work with; times and dates; expectations |[ ]
| Begin undertaking some work-based tasks, once required training has been completed | Self-directed | Ensure colleague is ready to begin work, and clear on expectations, processes, and how to access support |[ ]
| Self-directed reading, reflection and training | Self-directed | Using induction documents as a prompt, as well as a team-specific reading list if provided |[ ]
| Share news of new colleague via Library Update | Line Manager | As soon as possible once colleague has started |[ ]
| End of week meeting  | Line manager | Check in – how has the week gone? Any questions, concerns, things to discuss? Consider next steps on induction checklist, induction expectations and goals, and training and development plansSummary of plans for next week  |[ ]

## **Example/template: induction schedule**

Examples of weekly or daily schedules are provided below to help you plan activities for your new starter. Feel free to adapt your own schedule. Copy details to the new starter document once confirmed for them to familiarise with their activities for the week before or on starting. Once set up with their IT account details can be populated within the Outlook calendar.

**EG Weekly Schedule**

**Week 1: Enter Date**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Monday** Enter DateLocation Status | **Tuesday** Enter DateLocation Status | **Wednesday** Enter DateLocation Status | **Thursday** Enter DateLocation Status | **Friday**Enter DateLocation Status |
| **AM** | *Enter times and Activity* | *Enter times and Activity* | *Enter times and Activity* | *Enter times and Activity* | *Enter times and Activity* |
|  | **LUNCH** | **LUNCH** | **LUNCH** | **LUNCH** | **LUNCH** |
| **PM** | *Enter times and Activity* | *Enter times and Activity* | *Enter times and Activity* | *Enter times and Activity* | *Enter times and Activity* |

**EG Daily Schedule**

**Day 1: Enter Date**

|  |  |  |  |
| --- | --- | --- | --- |
| **Time** | **Location** | **Activity** | **Relates to induction goal** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Induction checklist

The new colleague’s induction toolkit document includes the full Induction checklist of essential and recommended induction actions, activities, learning and training. This toolkit is designed to ensure that all essential elements of the induction checklist are considered and planned by line managers, but it’s advisable for managers to consult the induction checklist prior to their new colleague starting to ensure they are familiar with, and have planned for, completion of all requirements.

Line managers should make the new colleague aware of the checklist in their first week, and explain that the new colleague should consult the checklist regularly to:

* Tick off activities, actions, training and learning which they have completed
* Identify any required training, learning or induction activities that they can work to complete independently (self-directed) during the induction period
* Make their line manager aware of any activities which have not yet been completed regularly throughout the induction period (e.g. at each end of week meeting, or regular check-in), so the manager can facilitate completion where possible

# Troubleshooting

## IT account

|  |  |  |
| --- | --- | --- |
| **Issue** | **Details** | **Action for managers** |
| Delay to activating IT account | It takes [up to 24 hours for new colleagues to be able to activate their IT account](https://www.staffnet.manchester.ac.uk/people-and-od/new-staff/first-day-essentials/) | Plan for an offline first day |
| New colleague has previous University affiliation | If the new colleague was previously a student or employee of the University, this can cause issues with their IT account. | Ask colleague if they were previously a student or employee of the University. If so, inform HR when obtaining staff ID card. HR may be able to locate and reactive an historic account, rather than creating a brand new account.If a problem with IT account occurs, raise an IT Services ticket (‘General request or IT issue’ - select ‘Something went wrong’ which will convert the ticket into an ‘incident’).Library IT will need to speak to IT integration team. Difficult to give a timescale for how long this will take to resolve. New colleague may need to liaise with HR to check and confirm personal details e.g. name, address etc |
| New colleague can’t access required systems such as mailboxes | IT account is activated but colleague has not been linked to correct groups within IT system URS | Raise an IT Services ticket: (‘General request or IT issue’ - select ‘Something went wrong’ which will convert the ticket into an ‘incident’).This is a minor issue; Library Digital Systems Analysts can resolve this relatively easily once the issue is recognised. |

Any updates required contact Lucy May lucinda.may@manchester.ac.uk / Janette Watson janette.watson@manchester.ac.uk