STAFF INDUCTION PROCESS

Guidelines

To be confirmed in their position, the new staff member must complete all agreed performance objectives that could reasonably be achieved during the probationary period. These will include agreed components of the Induction Program.

1. The Supervisor (Course Co-ordinator or other designated officer), Director of Studies and the new staff member must complete the following document jointly, over the first three months of employment.

2. This is a generic document containing the minimum requirements for induction.

3. This document is intended to provide new staff members with the fundamental information required to enable them to begin working effectively; however, it is important to note that induction and gaining organisational knowledge are ongoing processes that will continue throughout the staff member's career at Investment Banking Institute.

4. The completed and signed document is to be forwarded to the Supervisor for inclusion in the new staff member's personnel file.

5. The induction process will work in conjunction with policies and procedures for performance appraisal and management.

6. Skills Victoria Service Agreement obligations, definitions & interpretations are examined and reviewed with staff

I declare that I have undertaken the IBI staff induction program as set out below

New Staff Member Name	**Position Title**
Probation confirmation date	**Area**
"Buddy"	**Position Title**

Links to Performance Management

Induction of new staff is closely linked with performance management processes. New full-time staff members are subject to a standard probationary period of three months or the minimum required by law. As part of the probationary period, performance management should be undertaken to establish and clarify performance expectations, including those relevant to the probation period.

It is therefore suggested that performance management sessions in the first three months incorporate the necessary discussions on induction and probation.

Completion of relevant parts of the Individual Induction Program should be a key performance objective for the new staff member's first three months of employment.

Roles and Responsibilities

All staff share responsibility for the effective induction of new staff, encouraging a feeling of belonging and acceptance in the new staff member. However, the Chief Executive Officer, the "buddy" and new staff member each have specific responsibilities for ensuring the success of the induction process.

Position	Responsibility
College Director / Chief Executive Officer	Overall responsibility for the management of the induction, particularly: • Regularly reviewing the new staff member's progress through the Individual Induction Program
Director of Studies **Supervisor (Course Co-ordinator, or other designated officer)**	• Making the new staff member feel welcome within the team • Providing guidance, basic information and support • Establishing rapport with the new staff member • Completing all induction tasks delegated to them • Designing an Individual Induction Program that includes the

	specific learning needs required during the induction period.
New Staff Member	Investment Banking Institute expects all staff to manage their own performance and learning, in collaboration with the Supervisor. New staff members are expected to complete all activities outlined in their individual induction program.

Individual Induction Program

An Individual Induction Program with an orientation and a schedule of introductory meetings has been developed for new staff members. (Appendix 4 Induction Process - Forms for completion).   The introductory meetings are designed to provide the new staff member with an opportunity to meet key people relevant to the role, both within the work area and throughout the College community. These meetings will assist the new staff member in obtaining a greater understanding of the functions other areas perform and their roles and responsibilities, as well as what is expected of their own role and the nature of the relationship between the areas.

Prior to Commencement – Induction Checklist

It is important that the work area is adequately prepared for a new employee's arrival to ensure their early days are as enjoyable, and run as smoothly, as possible.

The SUPERVISOR should ensure that the following actions have been completed:

Activity	Check
• Prepare a schedule of meetings with key staff	❑
• Diarise the new staff member's commencement date and schedule first discussion	❑
• Nominate a "buddy" (if appropriate)	❑
• Inform other staff in the area that a new staff member will be starting and what the commencement date will be	❑
• Identify and establish an appropriate and fully-equipped and ergonomically sound workstation	❑
• Ensure keys, business cards, phone, computer and log-ins, etc have been arranged	❑

First Day and Week

When new staff members commence work with IBI, it is important that they are helped to settle in and made to feel a part of the team.

On the first day, it is important that new staff members are personally greeted by the Supervisor, welcomed to the area and introduced to their immediate colleagues and the nominated "buddy", if applicable. The Supervisor should spend some time explaining the structure and functions of the area and how it fits within Investment Banking Institute.

The first week should be spent in close supervision of the new staff member, explaining and demonstrating assigned tasks as required, observing the completion of these tasks and providing constructive feedback to the staff member. The Supervisor should maintain regular contact with the new staff member during the first week and review progress towards the end of the week.

First Day/Week – Induction Checklist

By the end of the first week, the SUPERVISOR should ensure that the following actions have been completed:

For Sessional and Teaching Staff

Induction Activity	Check
• Add new staff member to email, set up computer login and passwords	❑
• Clarify expected roles and responsibilities	❑
• Emphasise expected teaching approach aligned with AQTF standards. • Obligations under Skills for Victoria Program (Service Agreement)	❑
• Obtain Staff ID Cards	❑
• Arrange for keys and inform of security arrangements	❑
• Introduce to colleagues	❑
• Settle into classroom and demonstrate phone system and data projector system	❑
• Explain timesheet and timetable	❑
• Explain administrative procedures related to filing and recording, especially attendances and assessments	❑
• Inform of procedures for booking the use of facilities and equipment: room bookings, computer and resource	❑

centre bookings	
• Provide feedback on performance and corrective action. Include feedback from students.	❑
• Provide encouragement and support	❑
• Solve problems or challenges as they arise	❑
• Explain the functions/duties of the job and compliance/policy issues that govern their position	❑
• Go through the Individual Induction Program, explaining each part in detail – give the new staff member a copy to work through	❑
• Provide a brief overview of the Performance Management Scheme, and advise the date scheduled for the first discussion (to be held within the first week)	❑
• Describe how the new staff member's position relates to their colleagues	❑
• Explain major policies and procedures, including course policies and procedures and student policies as appropriate: ESOS Professional Development; Policies and Procedures Manual, Copyright, Intellectual Property, AQTF & obligations under Skills for Victoria Program 2011 Service Agreement etc.	❑
• Advise of the responsibilities to other colleagues and students, eg: information regarding discrimination on the basis of sex, race, sexuality or disability, and covering the Code of Ethical Conduct	❑
• Discuss payroll arrangements – direct queries to the Finance Manager	❑
• Complete Employment of Staff Form, Banking Details and Employee Declaration Form and return to Finance Manager	❑
• Complete Computer Usage Agreement	❑
• Explain the importance of confidentiality and access to sensitive information	❑
• Complete Confidentiality Agreement	❑
• Discuss relevant probationary requirements	❑

First Day/Week – Induction Checklist

By the end of the first week, the SUPERVISOR should ensure that the following actions have been completed:

For All IBI Staff

Induction Activity	Check
• Explain the functions/duties of the job and compliance/policy issues that govern their position • Skills Victoria funding obligations as detailed in the Skills Victoria Agreement	❑
• Go through the Individual Induction Program, explaining each part in detail - give the new staff member a copy to work through	❑
• Provide a brief overview of the Performance Management Scheme, and advise the date scheduled for the first discussion (to be held within the first week)	❑
• Describe how the new staff member's position relates to their colleagues	❑
• Explain major policies and procedures, including course policies and procedures and student policies as appropriate: ESOS Professional Development; Policies and Procedures Manual, Copyright, Intellectual Property, AQTF etc.	❑
• Advise of the responsibilities to other colleagues and students, eg: information regarding discrimination on the basis of sex, race, sexuality or disability, and covering the Code of Ethical Conduct (obligations under Skills for Victoria Program 2011 Service Agreement)	❑
• Advise of the conditions of employment, including attendance, punctuality, start/finish times, hours of work, leave entitlements, flexible working options and procedures for absences	❑
• Discuss payroll arrangements - direct queries to the Finance Manager	❑

• Complete employment of Staff form, Banking Details and Employment Declaration Form, Employee Personal Details Form	❑
• Discuss relevant probationary requirements	❑
• Complete Confidentiality Agreement	❑
• Complete Computer Usage Agreement	❑
• Complete Acknowledgement of Receipt of Staff Handbook	❑
• Complete Confidentiality Agreement	❑
• Complete OH&S Induction Checklist	❑

First Day/Week – Induction Checklist
Occupational Health and Safety (OH&S) Issues

The SUPERVISOR should discuss the following OH&S issues with new staff members:

Induction Activity	Check
• Outline the staff member's OH&S responsibilities	❑
• Explain how OH&S issues are raised and discussed in the work area (ie meetings, etc.)	❑
• Inform the staff member of any rules for safe working and advise of any hazards associated with their	❑

Induction Activity	Check
work	
• Outline procedures for reporting accidents and injuries and explain how to access forms	❑
• Provide any approved personal protective equipment necessary for the safe performance of tasks and instruct the new staff member on its proper use and maintenance, enforcing warnings of such equipment as required by legislation	❑
• Familiarise the new staff member with OH&S policy and procedures and any related OH&S guidelines.	❑

The SUPERVISOR should ensure that the following actions have been completed:

Induction Activity	Check
• OH&S Orientation – familiarise the new staff member with Emergency Exits, Evacuation Procedures and the location of First Aid supplies.	❑
• Explain other information resources available to the new staff member	❑
• Take an Orientation Walk with the new staff member to familiarise them with offices, colleagues, staff rooms, meeting rooms and wash rooms.	❑
• Explain the telephone system, mail system, how to obtain stationery supplies, office security, other systems appropriate to your area.	❑
• Supply a list of, and if necessary explain, common terms and acronyms	❑

First Week Induction Sign-off

SUPERVISOR:

I certify that the actions listed for the first week have been undertaken.

Name *(print):* _____ Signature: _____ Date: _____

STAFF MEMBER:

I certify that the actions listed for the First Week have been undertaken.

Name *(print):* _____ Signature: _____ Date: _____

Week 5 – Induction Checklist

Discussions concerning progress through the induction program are best integrated with regular performance management discussions. The new staff member should have had an introductory performance management session during their first week of employment, and will be scheduled to have a follow-up discussion at around Week 5.

The SUPERVISOR should ensure that the following actions have been completed:

Induction Activity	Check
• Discuss the staff member's progress and other relevant issues with Staff	❑
• Discuss with the new staff member their progress through their Individual Induction Program- if there are difficulties or concerns in completing the program on time, review the plan and set new timelines	❑
• Discuss with the staff member their feelings about the role and work environment, and their view of the progress and adequacy of on the job training	❑
• Document the session and have the new staff member acknowledge what was covered and agreed	❑

Week 5 Sign-off
SUPERVISOR:

I certify the above actions have been undertaken:

Name *(print):* _____ Signature: _____ Date: _____

STAFF MEMBER:

I certify the above actions have been undertaken:

Name *(print):* _____ Signature: _____ Date: _____

Week 9 – Induction Checklist

As mentioned previously, discussions concerning progress through the induction program are best integrated with regular performance management discussions.

This review meeting is critical as it links with probation discussions for staff.

The SUPERVISOR should ensure that the following actions have been completed:

Induction Activity	Check
• Discuss the staff member's progress and other relevant issues with the Director of Studies and decide whether the staff member is likely to complete all the induction activities that were agreed for the probationary period.	❑
• Discuss with the new staff member whether they are likely to complete all the induction activities that were agreed for the probationary period.	❑

Week 9 Sign-off

SUPERVISOR:

I certify the above actions have been undertaken:

Name *(print):* _____ Signature: _____ Date: _____

STAFF MEMBER:

I certify the above actions have been undertaken:

Name *(print):* _____ Signature: _____ Date: _____

Week 12 – Induction Checklist

At Week 12, the new staff member's induction period is complete.

The staff member has either received written confirmation of successfully completing probation, or has separated from employment.

Any outstanding induction activities should now be integrated with the staff member's ongoing Performance Plan.

The SUPERVISOR should ensure that the following actions have been completed:

Induction Activity	Check
1. Schedule the next Performance Management Session with the staff member	❑
2. File this completed Induction Checklist	❑

Week 12 Sign-off

SUPERVISOR:

I certify the above actions have been completed.

Name *(print):* _____ Signature: _____ Date: _____

STAFF MEMBER:

I certify that item 1 above has been completed.

Name *(print):* _____ Signature: _____ Date: _____

Individual Induction Program Pro-forma

Induction activities	Instructions	Session/ Completion Date	Staff Member Sign-off	Principal Lecturer's Sign-off

Individual Induction Program Pro-forma

Induction activities	Instructions	Session/ Completion Date	Staff Member Sign-off	Principal Lecturer's Sign-off

Please forward completed program to the CEO for staff member's file

VERSION CONTROL

Review/ amendment history

Policy Approved by: Chief Executive Officer

Responsible Officer: Chief Executive Officer

Next Policy Review Date: April 2017

Version	Date	Details
1.0	July 2014	Policy issued
2.0	Dec 2014	Updated to reflect Standards for Registered Training Organisations (RTOs) 2015
3.0	April 2015	Updated to reflect NVR 2015 Standards
4.0	April 2016	No material changes