



Westmorland  
& Furness  
Council

[westmorlandandfurness.gov.uk](http://westmorlandandfurness.gov.uk)

# Welcome to Westmorland and Furness Council!



# Guidance for Line Managers

We believe people are our greatest asset. It is important all employees receive an induction at the commencement of their employment with Westmorland and Furness Council. An effective induction helps to clarify roles, responsibilities, procedures and work standards; it also supports employees to settle into their posts quickly.

**Onboarding is the journey that an individual goes on when joining a new organisation. It starts at the moment a verbal job offer is made and continues through to their induction, probationary period and beyond. It is important that during this time, the new starter has a positive experience and feels welcome.**

This guide is designed to support managers throughout the onboarding and induction process. This should be utilised for new team members, as well as employees moving from other roles within the organisation. The way an individual is welcomed into their role, team and organisation can make a huge difference to the success of the appointment; whether they start in role and how long they stay in the role.

On 01 April 2023, all new employees will commence on the terms and conditions of the new Westmorland and Furness Council. This guide has been developed to reflect this, as well as reflecting key messages and the direction of Westmorland and Furness Council.

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# 1. Preparing for our new employee

## Keep in Touch

In order for our new employee to feel valued, excited and less anxious about their first day, it is important for you, as the line manager, to maintain contact with them during the period between the verbal offer of employment and their start date. This also provides you with an opportunity to support the completion of pre-employment checks and address any potential delays, which can be followed up with HR/OD where necessary.

## Onboarding and Induction Checklist

The Induction Checklist should be followed as soon as the employee's appointment has been confirmed. The checklist includes key activities throughout the whole of the onboarding and induction journey and provides a guide on time scales for activities and whom should complete.

A copy of the Induction Checklist must be given to the new employee on arrival.

**Changing posts** – you should use your judgement regarding what actions need to be covered and introductions made, for an employee joining your team from another role in the organisation. It may be helpful to discuss this in advance with them. Simply enter N/A if the checklist action is not required.





## Planning for Day One

Having kept in touch with your new employee will mean a good start to your working relationship. A further call or email prior to the first day will continue to set the scene and should, ideally, include the following:

For new employees coming into an office or another council site on day one:

Arrangement	Consider
<b>Arrival time</b> What time should they arrive?	It may be advisable for the employee to arrive slightly later than usual to give you a chance to settle and prepare for the induction. This will also allow them to miss any rush-hour traffic and have a more relaxed start.
<b>Travel</b> How are they planning to travel? Do they need a car park?	Check they are comfortable where to come and are aware of parking arrangements, especially if this is a different location to where they were interviewed.
<b>Reasonable Adjustments</b> Do they have/need any reasonable adjustments to access/ evacuate the building?	Are there any reasonable adjustments that you need to be aware of to ensure they can safely access/ work in and evacuate the building? Please ensure you know how to accommodate this prior to day one.
<b>Building Access</b> How do they access the building? How should they let you know, they have arrived?	Is there a reception and what are the opening hours? Do they have your phone number?
<b>Refreshments</b> What are the food and drink arrangements at the particular site?	Do they need to bring their own mug or hot drinks? Is there a kitchen? Is there anywhere nearby to buy lunch or snacks?
<b>Finish Time</b> What time should they expect to finish on day one?	As day one can be a long, hard day with lots of information to take in– it may be advisable to let them know they will be finishing earlier.

## Planning for Remote/Hybrid Employees Day One

While many of our employees are remote or hybrid workers, good practice remains to meet our new employees, in person on their first day. This helps set the scene that working on site or in an office is an important part of our working environment. In exceptional circumstances, the induction can be adapted for a remote first day.

## 2. Health, Safety and Wellbeing

We promote a positive health, safety and wellbeing culture at Westmorland and Furness Council.

You play a crucial role in supporting the positive health, safety and wellbeing of our teams and colleagues. Developing a strong health, safety and wellbeing culture can result in having a happier, healthier, performing team and **being responsible** for employee wellbeing is key to your role.

We aim to protect both the mental and physical health, safety and wellbeing of our employees. In terms of physical health and safety, it is important that all employees are given an adequate induction so they are clear on their own responsibilities, important policies and procedures and so they understand how to report incidents and concerns.

We believe it is essential that all our employees **are listened to** regarding any concerns over any challenges they face at work which can be discussed in regular 121s, appraisals and team meetings.

There is a core essential learning module that all new starters must undertake. There may also be job-specific safety related training required and this needs to be identified and planned as early as possible.

## 3. Our Culture and Values

We expect all our employees to live and breathe our vision and values.

In everything we do, we aim to:

- Ambitious
- Inclusive
- Outcome focused
- Collaborative
- Responsible
- Needs-led
- Ecologically aware

These values should underpin onboarding and induction, as well as the whole employee lifecycle at Westmorland and Furness Council. Managers are also leaders in setting and living and breathing our values and should drive change to achieve our high standards.

## 4. Customer Service

Customers are our reason for being. The importance of making every contact count and resolving customer enquiries on first contact, wherever possible, should be highlighted during onboarding and induction. There is a core essential eLearning module on Customer Service skills, required to be completed by all employees.



## 5. Learning and Development

Westmorland and Furness Council employees are required to undertake some core essential learning modules, which can be found on My Learning. These are:

- Information Governance and Data Protection
- Health, Safety and Wellbeing
- Customer Service
- Equality, Diversity, Inclusion and Belonging
- Safeguarding Awareness
- Climate Change
- Prevent

For employees with limited access to ICT, there are alternative resources available on My Learning to support you and your employee.

Further learning and development needs should be identified in the first few days or weeks. Some may even be identified before the individual's first day. These will vary from person to person and service to service and must be carefully planned on an individual basis to provide an effective induction. This will enable the new employee to quickly become effective in their new role.

Reviewing learning and development needs throughout the probationary period will help to reinforce and build upon the initial learning and development identified in the first few weeks.

## 6. Progress throughout Induction

### The first two weeks

Progress must be reviewed at the end of week 2 and further action taken on areas that have not been completed. This is also the opportunity to discuss and agree probationary objectives with the new employee.

### Progress by week 6

Weeks 2 to 6 should be seen as a consolidating period with final progress against the induction checklist reviewed at the end of week 6. If there are any concerns regarding any outstanding areas these should be addressed during this period.

As line manager you must sign off and record when an employee has completed their induction on iTrent People Manager. NB If you are a line manager from a previous sovereign district council, you may need to seek support from Human Resources to update iTrent People Manager.



## 7. The Probationary Period

All new employees are required to successfully complete a six month probationary period irrespective of any previous continuous service. In exceptional circumstances, the probationary period may be extended dependent upon the performance/circumstances of the employee - see the Council's Probation Procedure for further information.

If you have a new employee it is very important that you explain the probationary process to them, informing them what is expected of them and that this will be recorded on the Probationary Agreement Form.

Probationary periods do not apply to internal appointments provided the employee has successfully completed their probationary period. It is the manager's responsibility to check with the previous employing manager that the probationary assessments were successfully completed.

After each probationary meeting, you should ensure that the employee has the opportunity to review the discussion template and confirm that it is an accurate record of the discussion. This must then be uploaded and recorded on iTrent.

Once the new employee has successfully completed their probationary period they will be eligible for their increment.

The final probationary meeting should take place at 20 weeks from the start date of the new employee, with confirmation of employment and completion of probation being communicated to the new employee by 26 weeks from start date.

## 8. Buddy Scheme

The Buddy Scheme should be utilized for the majority of service areas. This is to provide a new employee with support during the first few weeks of their new role. You will identify an appropriate Buddy within the council and confirm with them that they are comfortable in supporting the new employee. It is advised the Buddy is a colleague within the same service and typically on the same or similar grade to the new employee.

The Buddy will support the induction and share the work included on the Induction Checklist, as appropriate. The Buddy Scheme is not designed as a replacement for management activities to support a new employee. However, the use of a Buddy may support the smooth transition of the new employee into their role.



## New Employee Induction Checklist

The induction checklist is to be owned by the manager and new employee in conjunction. Tasks may vary in ownership between the manager, buddy and new employee and discretion should be applied by the line manager as to who is responsible for owning the completion throughout the activities.

**Line Managers - please be aware, there will be specific procedures which apply from the previous sovereign office location, please continue to apply these procedures until further notice.**

<b>Employee Name:</b>	
<b>Job Title:</b>	
<b>Directorate:</b>	
<b>Start Date:</b>	
<b>Manager:</b>	
<b>Buddy Name:</b>	
<b>Buddy Contact Details:</b>	

### Checklist Key:

Policy and Procedure
Feeling part of the Team
Health, Safety and Wellbeing
Learning and Development
ICT and Systems



## Prior to Day One Checklist

Action	Responsible Person	Date Action Completed
Confirm outstanding recruitment documents and encourage/support new employee to complete as soon as possible.		
Prepare electronic employee personnel file, including induction checklist and probation information.		
Ensure new employee is on iTrent system, receive confirmation of payroll number.		
Request ICT equipment required – laptop/tablet, smartphone, monitor, keyboard.		
Request new employee ID badge in accordance with new employees' work base practice for badges.		
Send copy of Employee Guide to Onboarding and Induction to new starter.		
Arrange or plan demonstrations of relevant ICT systems including SharePoint, Outlook, iTrent etc. This should also include any role specific technology and systems such as role specific software and mobile phone.		
Discuss with employee any individual workplace needs which may need to be actioned prior to day one e.g. mobility/ disability issues which require a person emergency evacuation plan to be agreed (PEEP)		
Arrange for security fob to be prepared, to enable building access on day one.		
If applicable arrange for keys to be obtained.		
Ensure new employee is aware of any car parking arrangements prior to first day.		
Arrange any PPE or uniform to be available for day one.		
Arrange for any other personal security/ safety equipment e.g. lone worker procedures (buddy system, monitoring app/device, panic alarm, etc where applicable).		
Ensure individual risk assessment is complete if colleague is under 18 or a new/expectant mother (unless existing risk assessments cover this) This should include any special arrangements including supervision, work environments and prohibitions.		
Diarise meet and greet with new employee on first day, including workplace tour.		
Create Induction Plan and include introductions and activities for first two weeks.		
Assign a Buddy to support new starter.		
Inform team and wider colleagues of new employee start date and plan introduction.		
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## First Day Checklist

Action	Responsible Person	Date Action Completed
Introduction to Team and assigned Buddy		
Provide overview of the Council Plan and information on how to access it.		
Provide overview of our vision and values and how we live and breathe these values in our organisation.		
Provide an organisation chart and explain where the team fits in the structure. Introduce to other relevant employees within the directorate.		
Provide overview of work undertaken in the area, the main customers and how the work contributes to our purpose.		
Provide a clear overview of: <ul style="list-style-type: none"> <li>• Duties and employee responsibilities</li> <li>• Workstyle of job e.g., fixed, remote</li> <li>• Working hours, flexitime, breaks</li> <li>• How training and development needs are identified</li> <li>• Probationary policy and appraisals</li> <li>• Learning and development opportunities</li> <li>• Supervision policy, where appropriate</li> </ul>		
Provide ID Badge and security fob		
Comprehensive tour of Work Area, including: <ul style="list-style-type: none"> <li>• Kitchen/Refreshment areas; Toilets; Housekeeping; Car Parking; Mail and print arrangements; kitchen areas etc</li> <li>• Safety and security procedures – vehicle/pedestrian routes, locks, keypads, alarms, fobs, panic buttons, entrances, exits, lifts, alarms and any other security/access systems.</li> </ul>		
Provide information on fire exits, fire/emergency procedures. How to summon first aider.		
Issued with any required clothing and equipment, if applicable.		
Provide information on 'My Learning' and Core Essential Learning modules. Advise that Information Security and Data Protection must be complete on Day 1.		
Provide an overview of MyHR/People Manager, the Service Centre and People Management Portals. Including where key policies are located. If, as a line manager you are not able to access this system, please contact Human Resources.		
Provide overview of how to clock in/out, if applicable.		
Explain salary payment method, pay date, payroll number, allowances, expenses as per the Employee Pay and Benefits booklet.		
Create Induction Plan and include introductions and activities for first two weeks.		
Assign a Buddy to support new starter.		

## First Week Checklist

Action	Responsible Person	Date Action Completed
Meet client/service users, where applicable.		
Provide overview on all employee communication including Intranet, Newsletters, OneTeam, Yammer, Chief Executive Briefing, Noticeboards (as appropriate)		
Provide overview on leave/absence policy and how to request leave and report sickness.		
Provide overview of employee terms and conditions, including any contractual obligations covered within contract.		
Explain key details within employee code of conduct and provide information where to locate.		
<p>Explain access to employee's pension scheme, including:</p> <ul style="list-style-type: none"> <li>• LPPA (Local Pensions Partnership Administration)</li> <li>• The importance of completing all of the necessary paperwork including the Nomination Form</li> <li>• Signing up the "My Pension Online" system (where annual benefit statements, forecasts and records are available).</li> </ul> <p>Further information can be found Your Pension Service website.</p>		
Obtain information and instructions from Fleet services team and provide required information re driving while on council business. If the new colleague has not received this information two weeks after their start date, please contact Fleet Services.		
Overview of Health, Safety and Wellbeing policy and how to access service specific and corporate health and safety procedures.		
Provide information on accident, incident and near miss reporting procedures reporting procedures and how to report safety concerns, damage/ defects.		
Explain the Smoke Free- Workplace Policy and arrangements. Consult Public Health for further information if required.		
Explain information on car parking and travel, including permit information if applicable.		



<p>Service Specific Health and Safety</p> <ul style="list-style-type: none"> <li>• The main health and safety risks of the job role and how these are managed, communicating relevant risk assessments and safe working procedures.</li> <li>• Any essential or service specific health and safety related training, specific to job role.</li> <li>• Requirements of Working Time Regulations/ opt out procedures.</li> <li>• DSE Users to complete Workstation Assessment and training</li> <li>• Provide Health and Safety Team/ Trade Union H&amp;S Representative contact details. Directorate/service specific safety meeting information</li> </ul>		
<ul style="list-style-type: none"> <li>• The role of Occupational Health Service and how to access.</li> </ul>		
<ul style="list-style-type: none"> <li>• Wellbeing support available, e.g., counselling, Wellbeing Champions, Mental Health First Aiders</li> </ul>		
<p>Provide overview of essential equipment such as printers, telephones, photocopiers etc.</p>		
<p>Provide overview of ICT and Governance arrangements, including:</p> <ul style="list-style-type: none"> <li>• Helpdesk and support</li> <li>• Password and security</li> <li>• Email and calendaring</li> <li>• Network drives</li> <li>• Office 365</li> <li>• Working from home and agile working.</li> <li>• Laptops</li> <li>• General IT tips</li> <li>• Using desk phones, if applicable.</li> </ul>		



## First 6 Weeks Checklist

Action	Responsible Person	Date Action Completed
Signpost to Trade Union information and local representatives.		
Provide an overview of our coaching mindset and the role of manager and employee as a coach.		
Provide overview of Staff Network Groups.		
Attend or book onto the upcoming Council Induction event.		
Ensure any mandatory eLearning and directorate specific related training are completed  Corporate mandatory training includes: <ul style="list-style-type: none"> <li>• Information Security and Data Protection (Day 1)</li> <li>• Equality, Diversity, Inclusion and Belonging</li> <li>• Health, Safety and Wellbeing</li> <li>• Safeguarding Awareness</li> <li>• Climate Change</li> <li>• Prevent</li> <li>• Customer Service</li> </ul>		
Provide overview of climate change and our climate change commitment.		

## Declaration

I can confirm that I have been informed about and understand all of the above items relevant to my employment with Westmorland and Furness Council.

Employee Name:	
Signature of Employee:	
Date:	

I can confirm that the above induction and initial probationary review has been completed for the above employee:

Name of Line Manager (Inductor):	
Signature of Manager:	
Date:	

Please return this checklist to Human Resources once completed and signed. A hard copy of this checklist must be retained on the employee's personal file.

Manager: Use the iTrent People Manager to record the completion of the induction and upload a copy of the complete checklist to the employee's personal record.

## Translation Services

**If you require this document in another format (e.g. CD, audio cassette, Braille or large type) or in another language, please telephone: 0300 303 2992.**

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请致电 0300 303 2992

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**Se quiser aceder a esta informação na sua língua, telefone para o 0300 303 2992**

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