

# Managing Staff Induction and Probation



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# INTRODUCTION

This information leaflet is designed for heads of school/managers who have a specific responsibility for managing staff.

Local induction and the probationary period are two key areas to be addressed when employing a new member of staff. Establishing these processes and lines of communication will ensure that the staff member is able to integrate into their new role.

*Local Induction* is the job-specific orientation process that needs to take place at an early stage of employment. This equips the staff member with the necessary information to participate fully in their new role. This process will have a huge affect on the success of the new position within your school/unit.

The *Probationary Period* is part of the standard condition of employment and all staff are required to complete this process when commencing employment in UCD. It is the manager's responsibility to demonstrate that this period has been managed efficiently and where appropriate the person is confirmed in post.

Research has shown that omitting the introduction of a local Induction programme and a failure to manage the probationary period is exceedingly stressful for the new staff member, guarantees a longer period of unproductiveness for the employer, and may lead to unresolved problems at a later stage.

As you read this information leaflet, please keep in mind that induction is also important for existing staff members if a) they have never received proper induction or b) there have been many changes in the school/unit.

UCD HR are available for support and information on best practice for all UCD managers.

## LOCAL INDUCTION

It is the responsibility of the manager to ensure that a local induction programme has been arranged prior to the new staff member starting work in their area. This process enables the new staff member to integrate into the local surroundings and enable them to understand the culture that exists in their new working environment. A successful local induction programme will involve a team approach and will give the new staff member the opportunity to meet their colleagues and to gain an understanding of their role.

Local induction is job-specific and is designed to help staff members understand the:

- function of the School/Unit, and how the staff member fits in
- job responsibilities, expectations, and duties
- policies, procedures and regulations
- layout of the workplace
- introduction to co-workers and other people across the University
- teaching and research (if applicable)

## PURPOSES OF LOCAL INDUCTION

Induction isn't a nicety! It is used for the following purposes:

### **1. To Reduce Startup-Costs**

Induction can help the staff member get "up to speed" much more quickly, thereby reducing the costs associated with learning the job

### **2. To Reduce Anxiety**

Any staff member, when put into a new, strange situation, will experience anxiety that can impede his or her ability to learn to do the job. Proper induction helps to reduce anxiety that results from entering into an unknown situation, and helps provide guidelines for behaviour and conduct, so the staff member doesn't have to experience the stress of guessing

### **3. To Reduce Staff member Turnover**

Staff member turnover increases as staff members feel they are not valued, or are put in positions where they can't possibly do their jobs. The Induction process shows that the University values the staff member, and helps provide the tools necessary for succeeding in the job

### **4. To Save Time For Supervisor & Co-Workers**

The stronger the induction process, the less likely supervisors and co-workers will have to spend time teaching the staff member

### **5. To Develop Realistic Job Expectations, Positive Attitudes and Job Satisfaction**

It is important that staff members learn early on what is expected of them, and what to expect from others, in addition to learning about the values and attitudes of the university. While people can learn from experience, they will make many mistakes that are unnecessary and potentially damaging

### **Helpful Tips in organising you Local Induction programme:**

1. Induction should begin with the most important information (basic job survival).
2. Induction should emphasise people as well as procedures and things. Staff members should have a chance to get to know people and their approaches and styles in both social and work settings
3. Buddy a new staff member to a more experienced person, but make sure the more experienced person wants to buddy up, and has the inter-personal skills. This provides ongoing support
4. Introduce new staff members to both information and people in a controlled way. A new staff member will not absorb everything at once. Space out introductions

### **Conclusion**

A local Induction programme will make a significant difference in how quickly a staff member can become more productive, which will have long term effects for the University. To help you in the induction process, we have included a checklist for the job-specific induction which can be found in the appendix attached

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## UCD ORIENTATION

A second part of the induction process is the overview orientation. UCD HR provides a university wide orientation programme for all new staff members. This is run throughout the year and HR Learning & Development will invite all new members of staff to attend or you

can book on the UCD Orientation at <http://www.ucd.ie/learninganddevelopment> under the 'Upcoming Courses' section. This programme does not replace the local induction, but instead provides an overview of the essential information required to understand the broader functions, systems and services that exists in the university. We would ask you to encourage all new staff members to attend this overview orientation programme.

## PROBATIONARY PERIOD

It is the responsibility of the manager to ensure that all new staff members probationary periods are managed appropriately.

The probationary period applies to all new permanent and temporary staff joining the University. The process ensures that there is ample opportunity for:

- the university to assess the performance of the member of staff in the job and
- for the member of staff to fully understand the role, their responsibilities and the expectations of them in the job

During the probationary period, the manager and the staff member meet at three monthly intervals to discuss the requirements of the role. These meetings can also be used to evaluate the member of staff's overall compatibility with the school/units objectives.

In order to make the probationary period effective it is important at the very beginning to sit down with the new staff member and to:

1. Go through the job description and ensure the member of staff understands the tasks and responsibilities of the job;
2. Set out the member of staff's objectives clearly;
3. Identify any initial training needs and provide necessary internal or external support;
4. Organise the local induction programme which introduces them to the key people/schools/units they will be dealing with.
5. Set out the questions you will be asking when consulting with other staff in the school/unit and in other schools/units prior to the formal meetings which will be held every three months.

It is important that, at least each month, the manager meets with the new member of staff to assess how they are progressing and to discuss any issues which may have arisen.

It is also important for more formal review meetings to be held between the member of staff and the manager. Meetings should be held at the end of:

Three months  
Six months  
Nine months  
Twelve months

The final assessment meeting will be followed by confirmation of your post unless there are problems in terms of performance or compatibility.

HR Learning and Development offer seminars for managers and staff members on Managing the Local Induction and Probationary Period process (Managers) and Managing your Probationary Period (Staff). For more information please contact:

[staffdevelopment@ucd.ie](mailto:staffdevelopment@ucd.ie)

#### USEFUL DOCUMENTATION

1. The probation form for recording the formal meetings during the Probationary Period.
2. Probationary Period Guidelines for Staff
3. Head of School/Unit Guidelines for Managing Probationary Period Meetings.

All available from: <http://www.ucd.ie/hr/a-z/probationperiods/>

## APPENDIX

### Local Induction Checklist

(To be completed on arrival with your Head of School/line manager)

**My Personnel Number:**

**My work phone Number:**

**My work email address:**


The “local Induction” is the most important part of the orientation process and this checklist is designed with your integration in mind.

It is recommended that the following points should be covered during your discussion with your Head of School/Unit (or designated colleague) on arrival. A basic level of information around the role and functions of the School / Unit must be provided on commencement.

#### School / Unit information

- ☐ Introductions to colleagues and tour of the School/Unit.
- ☐ IT set up and passwords.
- ☐ Contact details for colleagues and School/Unit.
- ☐ Details of “local arrangements” regarding holidays and working hours.
- ☐ Who to contact when absent or sick. Please also view the sick leave policy [http://www.ucd.ie/hr/t4cms/Managing Attendance and Sick Leave Policy.pdf](http://www.ucd.ie/hr/t4cms/Managing_Attendance_and_Sick_Leave_Policy.pdf)
- ☐ Location of service areas.
- ☐ Dress codes (*if applicable*).
- ☐ Location of stationary supplies and procedures for ordering
- ☐ Location of photocopiers / scanners / fax machines / printers / phones / post
- ☐ Details on access to buildings and swipe cards (*if applicable*).
- ☐ Parking facilities (*see General Information section for more additional information*)
- ☐ Information on designated support colleagues (See policy on Dignity & Respect contained in the Policies section of the HR website <http://www.ucd.ie/hr/policies/#d.en.31151> )

#### Job Information

- ☐ Outline probation review date and important milestones and targets I need to be aware of.
- ☐ Overview of UCD strategy and how it applies to the school/unit
- ☐ Overview of the School / Unit strategy and how it applies to my work.
- ☐ Details of the specific duties assigned to me and expectations.
- ☐ Reporting and communication lines in the School / Unit.
- ☐ Overview of the responsibilities assigned to others in the School / Unit.
- ☐ Organisation charts for my area.

- ☐ General information on projects and committees within my School / Unit.
- ☐ Outline of my immediate work plan.
- ☐ To access any Learning & Development offerings, please take a look at the UCD Learning & Development website ([www.ucd.ie/learninganddevelopment](http://www.ucd.ie/learninganddevelopment)) or contact [staffdevelopment@ucd.ie](mailto:staffdevelopment@ucd.ie). Please note you must consult with your manager prior to booking on to any of these courses.
- ☐ For Post-Doctoral Research Fellows Levels I & II access to learning and development can be found through Research Skills & Career Development on; <https://intranet.ucd.ie/researchcareers/>.

### Health and Safety Information

- ☐ Details of fire exits and emergency procedures.
- ☐ Location of First Aid Kit and who to report accidents to.
- ☐ Location of fire extinguishers.
- ☐ Name of fire marshal.
- ☐ Details of hazardous materials on site (*if applicable*).
- ☐ Copy of local safety statement (*For overall UCD Safety statement, see UCD website*).

### Teaching and Research (*if applicable*)

- ☐ Details on current teaching and research in my area.
- ☐ Information on:
  - Banner Gradebook support and training.
  - Blackboard virtual learning environment.
  - Modularisation.
  - Timetabling.
  - Research Management System.
  - Business Objects.
  - Guidelines on lecturing.
  - Exam process.
  - Setting up graduate students.
  - Grant applications – who signs off on what?
  - Development opportunities and supports within the University. Information available at: <http://www.ucd.ie/learninganddevelopment> and <https://intranet.ucd.ie/researchcareers/>

### Signature of new staff member:

Name: \_\_\_\_\_ Date: \_\_\_\_\_