The RIBA Compact Induction template

An induction process encourages new staff to become integrated and productive members of the organisation quickly and settle into their period of practical experience, supported by a manager/senior colleague. This induction checklist is available to be used (or adapted) for the needs of a recruited employee in the early stages of new employment. Outlining the company procedures and processes should help new staff settle well into the team and understand their professional role and responsibilities. It is helpful to provide all relevant information relating to:

* 1. the job
  2. the organisation’s rules, policies and procedures
  3. grievance and disciplinary procedures
  4. pay and employment conditions
  5. health, safety and welfare policies
  6. other relevant policies and procedures, e.g. email and internet policy.

The [RIBA Compact Obligations](https://www.architecture.com/-/media/0FEAED09851A49EEAC2E604A029C7427.pdf?la=en) can also be referred to for the responsibilities a mentor/supervisor and student are committing to.

Completing the Induction process

During the induction period, the employee will gradually be integrated into their job and the organisation as a whole. Using the induction checklist as a guide, the supervisor should ensure that all essential information is communicated to the employee in a manner and a period which is considered appropriate.

Follow-up interviews can be conducted at suitable intervals (forming the initial stages of the organisation’s appraisal procedure) when the employee’s progress will be monitored. This could either be completed in the induction process or as part of the PEDR sheet appraisals. The employee should be given the opportunity to ask questions and to raise any matters of concern.

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| **Name of employee:** | **Job title:** |
| **Employment start date**: | |

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| **First day of employment** | **Carried out by** | **Date** | **Notes** |
| Welcome and initial introduction by designated member of staff |  |  |  |
| Provide employee with designated workspace, computer login details and show location of key facilities |  |  |  |
| Introduce them to their line manager, colleagues, employment mentor and senior managers |  |  |  |
| Deal with any key HR matters such as: P45 tax form, National Insurance number, passport, national identity card, evidence of permission to work in UK, employee handbook, personal details form |  |  |  |
| Outline health & safety matters i.e. fire drill, first aid |  |  |  |
| **First week** | **Carried out by** | **Date** | **Notes** |
| Introduction to the company, to include: Departments, structure, history, future plans |  |  |  |
| New employee’s job  Outline all aspects of the role; how it fits within organisation |  |  |  |
| Outline expected performance and how it will be assessed |  |  |  |
| Job training offered and timescale |  |  |  |
| Opportunities for personal/professional development – in-house or external CPD (to log on PEDR i.e. site visits, meetings, event) |  |  |  |
| New employee’s terms and conditions of employment  Go through contract to ensure they understand and have T&C’s in writing; including details of probationary period |  |  |  |
| Hours and breaks (The Working Time Regulations) and holiday allowance  Flexible working arrangements |  |  |  |
| Salary and pay dates |  |  |  |
| Pension information |  |  |  |
| The organisation’s important rules on:   * job performance * discipline * absence, including because of illness and sick pay * insurance * complaints against staff, such as bullying and harassment * dismissal * notice of terminated employment   Also say where more details can be found |  |  |  |
| Other important rules such as use of the company internet, email and phones |  |  |  |
| Periods of notice  Study leave to be agreed: amount and timeframe, and whether any annual leave expected to be used  [Study leave can be used for: PEDR Monitoring support, recall days, prep for Part 3 courses + any additional study days] |  |  |  |
| Policies for maternity/paternity /parental leave/shared parental provisions |  |  |  |
| Details such as dress code, parking, smoking, canteen and rest facilities |  |  |  |
| Complete documentation on new employee’s appointment for their personal file to be kept securely |  |  |  |
| Health & safety  Detailed training on health & safety in the organisation |  |  |  |

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| Aims for the employee to achieve in the first month Gain skills/knowledge, and use towards PEDR sheets | **Carried out by** | **Date** | **Notes** |
| * list here… |  |  |  |
| **First month** | **Carried out by** | **Date** | **Notes** |
| Towards the end of four weeks, hold an informal meeting with the line manager to assess how the new starter is adjusting to their role, and whether they have any particular coaching or training needs, or other concerns |  |  |  |

**Signed:**

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| **Employee:** | **Supervisor/mentor:** |
| **Date:** | **Date:** |

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| **At three months, end of quarter review** | **Carried out by** | **Date** | **Notes** |
| Review with the line manager how the new starter is settling in and performing  This is also an opportunity to pinpoint any development needs, set timescales for achieving them and adjust work targets if required  (Refer to PEDR/Part 3 criteria) |  |  |  |

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| **At six months** | **Carried out by** | | **Date** | **Notes** |
| Review [post-probation period]  Line manager + student look to the next six months, any new work objectives, and any experience, coaching or training needs. Can combine discussion for PEDR sheet appraisal. |  | |  |  |
| **At 12 months** | | **Carried out by** | **Date** | **Notes** |
| Ask the employee for feedback on their induction/ practical experience– what worked well?  What could be improved? | |  |  |  |