**Induction Template Examples - Employees**

***Induction Templates need to be specific for the new job/role the following are examples only***

* *Change the logo in the Header to your own*
* *Use the select all then replace all to amend the document for your NGB*
* *If your NGB is an unincorporated organisation i.e. not a Company replace all reference to the Board of Directors with the name of your NGB governing committee e.g. Executive or Management Group*
* *If your NGB is a charity your governing group may be the Trustees or similar*

Further information has been included in the WSA templates relating to induction of employees

1. A General Induction checklist
2. Induction – the Importance of Getting it Right
3. Induction – 3 month review template

Information is also available in the templates regarding the induction of Directors and Executive Members

**Induction Examples Included below**

Example 1 – CEO

Example 2 – Employee responsible for Finance

| **INDUCTION EXAMPLE 1 - CEO** |
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| **KEY TASKS: *insert the tasks from the job description in this column e.g.:-*** | **Specific Induction Needs Relating to each key job description task** | **General Induction as an Employee** |
| 1. Deliver the insert NGB’s vision, uphold its standards and values, and help maintain its obligations to the membership. Show a commitment to the insert NGB and its objectives.
 | * “Buy In” to philosophy of insert NGB
* Establishing the division of responsibilities between the chair and chief executive in writing and agreed by the Board (see Governance and Leadership Framework for Wales)
 | * Attend Board Meetings (approximately insert number per year), read most recent at least 3 meeting minutes
* Building layout, including H&S issues and fire exits
* Understanding of expenses payments and claims
* Understanding of and completion of current forms relating to conflict of interest etc.
* Email and general email access
* Send out introduction letter and update for website
* Understanding of insert NGB staffing and volunteer roles within the organisation
* Understanding the annual calendar and its impact on work trends
* SW organised induction for any topical issues
* Understanding affiliation and membership services
* Understanding where insert NGB fits in to the British, European, Commonwealth and World structures for your sport
 |
| 1. Help establish the strategic aims of the insert NGB and drive the development of a new strategic plan linked to operational delivery
 | Reading and understanding of* Current Strategic Plan and the key strands of work
* insert NGB previous development plan reviews and current annual forward plan/operational plan
* Understanding budgets and plans submitted to SW with outline requirements and specific dates
 |
| 1. Work with the Board to ensure that operational delivery has the necessary resources for the insert NGB to meet its targets.
 | * Understand the KPIs and the resource needs
* Understand the accounting policies used
* Look at financial issues including discussions on importance of income generation and cost reductions to organisation
* Understand how to make judgements and estimates that are reasonable and prudent
* Be able to read the prepared financial statements (on the going concern basis)
 |
| 1. Understand the views of the members directly where possible as well as through Board members and other staff
 | * Committee structures, roles and remits and how the system currently works
 |
| 1. Self-Assurance System and Governance of insert NGB
 | * Database overview and data regulations, understanding which financial packages are used (not necessarily being able to use them unless this is part of the job description) and by whom
* Overview of the insert NGB procedures (manual) including general practices and major processes
* Reporting lines, Terms of Reference for committees etc.
 |
| 1. Ensuring the Association complies with all legal and regulatory requirements and statements of best practice and conducts its business in a transparent manner at all times
 | * Receive and read copies of current Articles, Byelaws and other policies
* Declaration of Interests linked to meetings
 |
| 1. Staff management
 | * Understand current staffing structure
* Roles and responsibilities, targets, KPIs, management review process etc.
 |
| 1. Help identify gaps in the insert NGB
 | * What exists, previous SWOT analysis
* Current numbers, targets for membership, coaching, performance etc. trends
 |
| 1. Assess and manage risk within the governance framework of the insert NGB
 | * Read and understand the current risk strategy and register
* Read and understand the H&S policy and risk assessments
* Read and understand the Business Continuity Plan
 |
| 1. Provide essential leadership to the Association along with the Chair
 | * Understanding the role and work of the CEO, Chairman, Secretary and Finance Director and their interface with each other
 |
| 1. Local Authority development work
 | * Determine current insert NGB links to LAs
* Understand how LA staff work for/with insert NGB for sport delivery
 |
| 1. Liaise with International Federation
 | * Understand how the International /British/Commonwealth Federation works, key people, contacts etc.
* Read last 12 months minutes of meetings and associated paperwork
 |
| 1. To work as appropriate with other National Governing Bodies, the CEO Forum, the Welsh Sports Association and others
 | * Overview of Welsh Sport e.g. notes from CEO Forum
* Check out websites and links for other organisations
 |
| *Add in additional notes* | *as required for your NGB* |

| **INDUCTION EXAMPLE 2 FINANCE EMPLOYEE** |
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| **KEY TASKS:** *insert as appropriate* | **Specific Induction Needs** | **General Induction** |
| 1. Implement financial procedures in line with organisational requirements, including being proactive in suggesting improvements to existing policies and procedures.
 | * “Buy In” to philosophy of NGB – CEO explanation
* Reading and understanding:
* current Strategic Plan and the key areas of work
* current Detailed Financial Procedures Manual and NGB specific Instructions
* most recent audit of NGB (if one has taken place)
* current financial risk management
* Training on finance system to be delivered by…insert name
* Look at financial issues including e.g. current cost reductions being implemented to save money
 | * SWNC Building layout, including H&S issues and fire exits and drill information for office.
* Understanding of and completion of current forms relating to conflict of interest.
* Email and general email access.
* Send out introduction letter and update for website.
* Understanding the *JOB* Roles and responsibilities, targets, Key Performance Indicators
* Management and appraisal review process being used
* All other employment regulations relating to the post e.g. dress code
* Understanding the NGB staffing and volunteer roles within the organisation and how they link/work together
* Understanding of the annual calendar of NGB e.g. meeting schedules, events etc. and the likely impact on work trends.
* Sport Wales organised induction for any topical issues, to be arranged by SW Liaison Officer.
* Understanding affiliation and membership services.
* Understanding where NGB fits in to the British, European, Commonwealth and World structures for the sport.
 |
| 1. Produce accurate financial reports on a monthly basis and as required by budget holders and the Board
 | * Discussion with CEO on format of reports and budget holding agreements
* Read up to date budgets and plans submitted to SW with requirements and specific dates
* Arrange meetings with current budget holders to agree a method of future working and reporting
* Agree format of reports for the Board
 |
| 1. Account for receipts and payments for NGB schemes, membership and equipment, day-to-day responsibility for banking and bank reconciliation, petty cash etc……
 | * Understand and review the banking system used, account signatories, online banking requirements, filing systems, legal requirements
* Bank reconciliation process
 |
| 1. Arranging salary, pension and expenses payments to staff, including national insurance and tax liabilities, with the assistance of a salary bureau service.
 | * Reading and understanding how the Salary payment system works
 |
| 1. Upkeep and maintenance of the NGB assets including the control of stock and equipment, and the maintenance of a fixed asset register.
 | * Current stock control system, review and update
* Current Asset register, review and update
 |
| 1. Self-Assurance System completion of finance sections in consultation with Finance Director.
 | * Receive and read copies of current Articles, Committee structures, roles and remits and how the NGB governance system currently works
* Receive training on the online assurance system
 |
| 1. Responsible for communication with membership relating to all financial matters.
 | * Determine the current level of communication, read files and ascertain requirements, discuss database usage with other staff members
 |
| 1. To work as appropriate with other National Governing Bodies and Sport Wales to share good practice and areas of commonality.
 | * Overview of Welsh Sport, Sport Wales website, Welsh Sports Association website
* Set up RSS feeds and links to appropriate websites to develop a mechanism to ensure information regarding changes to financial legislation is obtained and implemented.
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