**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. |