**Senior Executive Induction & Orientation  
Guide - Template - Checklist**

# INTRODUCTION

These guidelines and template have been designed for use as a stand-alone induction and orientation checklist to help the onboarding process of new Senior Executives. However, you may wish to modify it to better suit your organisation, or simply use as a guide to compare the recommended elements with your existing Senior Executive induction and orientation processes.

The guidelines and template have been developed to support the implementation of the [*Senior Executive Leadership Capability Framework*](http://www.dpac.tas.gov.au/divisions/ssmo/learning_and_development/leadership/project_no_1/senior_executive_leadership_capability) (SELCF) by ensuring the effective induction of Senior Executives to the Tasmanian State Service.

# HOW TO USE THIS GUIDE

The template is a guide only and may be utilised as best suits your agency needs.

The text in ***blue italics*** is for guidance only, however each induction item and suggested content is recommended as a minimum for on-boarding a new Senior Executive. It should be used in conjunction with any other agency materials or activities undertaken at the commencement of employment eg site specific Work Health and Safety inductions.

Any questions or comments on enhancing the checklist are most welcome.

# CONTACT

SSMO is interested in your feedback, in particular:

* extra induction items you think need to be included on the checklist
* hearing how your Agency/Authority has gone about embedding the SELCF; and
* how we can share this information more broadly across the State Service.

Please direct any feedback or questions on the SELCF to Viv Burgess at the State Service Management Office – email [viv.burgess@dpac.tas.gov.au](mailto:viv.burgess@dpac.tas.gov.au) or for any further information, please contact the State Service Management Office.

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| <insert Agency/Authority name> | |
| Officer’s Name: |  |
| Title: |  |
| Branch: |  |
| Division: |  |
| Commencement Date: |  |
| Induction conducted by: |  |

*Welcome to the <Agency>*

*The Induction and Orientation Checklist has been developed as a guide for providing you as a new Senior Executive within the Tasmanian State Service with information about:*

* *Working in the Tasmanian State Service and in particular the <name of agency>;*
* *The structure and functions of your Agency/Department;*
* *Departmental policies and processes of your Agency/Department;*
* *Your rights and responsibilities as a Senior Executive in the Tasmanian State Service; and*
* *Your Instrument of Appointment and conditions of service as a Senior Officer in the Tasmanian State Service.*

*It is also an opportunity for you as a new Senior Executives to:*

* *familiarise yourself with the Agency; Division and the work area;*
* *familiarise yourself with the Senior Executive Leadership Capability Framework*
* *be introduced to your co-workers, senior management teams; executive management teams and other key staff;*
* *discuss your Agency’s goals and objectives; and*
* *gain an understanding of your role and key responsibilities and behaviours required of you as a Senior Executive in the Tasmania State Service.*

*It is the responsibility of you and your direct Supervisor to ensure the Induction and Orientation Checklist is completed for each section of this document. Each item is to be ticked off as it is completed.*

*Any questions or comments about the Induction and Orientation Checklist are welcome, for example other topics you would like information on and/or areas you believe were not covered to your satisfaction.*

*Once the Induction and Orientation Checklist has been completed, it should be forwarded directly to the Human Resources Division to ensure that any outstanding matters are dealt with in a timely manner.*

*Further information*

*<name>  
<title>  
Human Resources*

*Phone: 62xx xxxx  
Email:* [*name@department.tas.gov.au*](mailto:name@department.tas.gov.au)

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| **ON YOUR FIRST WEEK YOU SHOULD …** |
| **UNDERSTAND AND LEARN ABOUT YOUR WORK ENVIRONMENT** | | |
| Item and detail | | Suggested content |
| 🖵 | Begin to understand your new role  *Use the Officer’s Statement of Duties and the Senior Executive Leadership Capability Framework as a starting point and ongoing context.*  *Consider it as the first conversation in the Performance Management process and document accordingly.* | Discuss Work Plan and immediate priorities  Introduce direct team / colleagues  Know about initial project plans / outputs  ……………………………………………..  …………………………………………….. |
| 🖵 | Tour the workplace  *At a minimum the new Officer should be provided with a tour of the workplace and surrounding environs including the following:* | Kitchen and toilet facilities  First Aid Officer and facilities  WHS representative  Office environment  Parking facilities (where applicable) |
| 🖵 | Visit Human Resources  *At a minimum the new Officer should meet the HR team to finalise any outstanding paperwork in regard to your appointment/promotion.* | Finalise Instrument of Appointment  Discuss Superannuation arrangements  Provide bank account details  Know hours of work  Understand reporting arrangements  Understand leave entitlements  Understand process for Notification of absences  Provide a link to Employment Direction No. 17 |
| 🖵 | Meet the Head of Agency and Deputy Secretaries  *At a minimum the new Officer should meet with the Secretary and any Deputy Secretaries with other positions likely to depend on the size of the Agency. Meet the Executive Management Team* | Arrange to meet Head of Agency (Contact PA)  Arrange to meet Deputy Secretaries  Meet the Executive Management Team  Meet the Director, Corporate Services |
| 🖵 | Meet staff in the Division  *At a minimum the new Officer should meet with staff of the Division and with other positions likely to support the new Office holder.* | Arrange to meet Colleagues  Arrange to meet the Management Team  Other Managers and areas as required |
| 🖵 | Meet staff from other Divisions (if relevant)  *Consider where there is cross division work and also challenges that may arise in the job that other divisions, or specific people, could assist with. Ensure any areas of sensitivity are covered.* | Divisions relevant to the position eg Corporate Services |
| 🖵 | Be provided with an Agency Overview / Values  *Consider the following elements as a minimum depending on where the role sits - some areas may need more explanation than others.*  *A clear explanation of where the role “fits in” to the structure.*  *A clear explanation of plans and objectives of the Agency should also be outlined as part of this overview.* | Outline Agency structure  Explain Agency Strategic Plan  Explain current Agency Business plan / Objectives  Outline Annual Report  Discuss Agency Governance including leadership team and Executive  Tasmanian State Service Annual Report |
| 🖵 | Understand IT arrangements  *Also consider if there are any programs or systems unique to the division or Agency that they need to be aware of; assess what if any training may be needed and book this in.* | Know passwords/access to IT systems  Agency Internet Usage Policy  Agency intranet Usage - familiarise Officer re intranet  IT Training needs identified |
| 🖵 | Understand Facilities  *Outline of policies and procedures, key contacts, out of hours access, who to contact in case of issues.* | Facilities management  Security Pass  Agency’s Vehicle Policy / arrangements  Agency’s Mobile Phone Policy |
| **COMPLETED** |
| **DATED:** |

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| **WITHIN THE FIRST MONTH YOU SHOULD …** |
| **KNOW ABOUT THE AGENCY’S POLICIES AND PROCEDURES INCLUDING DELEGATIONS, HUMAN RESOURCES, FINANCE AND RECORDS MANAGEMENT** | | |
| Item and detail | | Suggested content |
| 🖵 | Meet the Human Resources (HR) Division  *Cover both what they need to know as a new Officer and also what processes they will need to know for staff reporting to them; if possible introduce to HR staff. Consider particular areas of HR they may need to know about (IR, Org Dev, Payroll) and where to go for general advice.* | Internal HR processes (Agency checklist)  Payroll processes  Travel Policy and making claims; allowances  (interstate and intrastate)  Discuss Employee Assistance Program/s and Provider/s  Understand current recruitment and vacancy control processes  Performance Management Process (YOU)  Performance Management Process (YOUR TEAM)  Social Activities / Agency Social Club (if relevant)  Undertake Ergonomic Assessment (if relevant) |
| 🖵 | Meet the Finance Division  *As well as a general overview of processes in the Agency and key contacts, outline Treasurer’s Instructions and specific ones that apply to the job. If possible introduce to Finance staff.*  *Finance, HR, other administrative – explain what delegations sit with the position and also what delegations fall immediately under and above the position.* | Budget processes  Corporate Credit Card Policy and usage  Finance structure and services  Gifts and benefits  Discuss Departmental Procurement processes  Treasurer’s instructions  Understanding of Agency Delegations  Appropriate use of Government resources |
| 🖵 | Meet Records Management Unit  *Provided with a general overview of how the Agency captures its corporate information; filing conventions and electronic corporate information.* | Arrange access to Records Management System and organise training  Understand Records Management Policy  Meet key staff in Records Management  Training needs identified ………………………. |
| 🖵 | Meet the Work Health and Safety (WHS) representative  *Provide clear direction on the expectation that safety is key and that both working safely and ensuring a safe workplace for their teams is a priority. Cover hazard and incident reporting and any higher level involvement they may have in hazard management.*  *If possible introduce to WHS staff.* | Briefed on requirements of being an ‘Officer’ under the WHS legislation  WHS legislation, Policy and processes  Ergonomic workstation assessment  Any WHS Hazards / training to be provided  Training needs identified:…………………………….. |
| 🖵 | Know about Whole-of-Service Compliance matters  *Provided with a general overview of Compliance matters that the Senior Office should be aware of through Employment Directions and participate in training courses where mandatory.* | Work Health and Safety  Ethics  Diversity Policy  Family Violence  Training needs identified:…………………………….. |
| 🖵 | Know Agency / Division Emergency Procedures  *Provided with a general overview of Emergency procedures for the Agency; including evacuations and emergency procedures.* | Discuss Emergency Evacuation procedures  Discuss muster points  Discuss First aid stations and Officers |
| **COMPLETED:** |
| **DATED:** |

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| **WITHIN THE FIRST 3 MONTHS YOU SHOULD** |
| **KNOW MORE ABOUT THE STATE SERVICE GOVERNANCE AND GOVERNMENT** | | |
| Item and detail | | Suggested content |
| 🖵 | State Service Governance arrangements  *An overview of the State Service Act, the Regulations, Employment Directions; Ministerial Directions and the role of the Employer, the Minister and the Tasmanian Industrial Commission (TIC) in governance matters.* | State Service Governance framework  Know about the role of the State Service Management Office (SSMO)  Know about The Training Consortium and register for the TTC Newsletter |
| 🖵 | Overview of State Service Legislation and subordinate legislation including regulations   * *State Service Act 2000* * *State Service Code of Conduct / Principles* * *Integrity and Ethics* * *Any specific Agency legislation*   *Consider if Integrity Commission or other training that is required.* | Overview of the *State Service Act* 2000  State Service *Code of Conduct*  *State Service Principles* including discussion on conflict of interest  Ethics and the role of the Integrity Commission  Introduction to Employment Directions |
| 🖵 | Machinery of Government  *Provide an overview of the bodies involved, how legislation is prepared and enacted. Consider what involvement the Officer may have in Budget Estimates and in liaison with the Portfolio Minister/Portfolio Services (including Ministerials).*  *Provide key contacts as well as familiarising them with specific requirements.* | Parliament, Cabinet, Ministers  Passage of legislation  Budget Estimates  Portfolio Minister/s and liaison  Process for Question Time Briefs (QTBs) |
| **COMMUNICATION AND ENGAGEMENT WITH STAKEHOLDERS / CLIENTS** | | |
| 🖵 | Internal engagement  *Ensure all committees, working groups are included and their scope/Terms of Reference, outputs and structure (people and positions) are outlined as well as the level of responsibility and authority the position holds. Where possible review upcoming dates and times for next meetings and give key contacts.*  *Provide a summary of other Agencies and particular information about anywhere cross-agency work is undertaken. Consider any particular sensitivity that should be outlined up front.* | Contact with Internal stakeholders |
| Other Agencies |
| List of Committees  ……..…………………………………………….  ………………….……………………………….. |
| 🖵 | External engagement  *Ensure all committees, working groups are included and their scope/TORs, outputs and structure (people and positions) are outlined as well as the level of responsibility and authority the position holds. Where possible review upcoming dates and times for next meetings and give key contacts.*  *Provide a summary of other Agencies and particular information about anywhere cross-agency work is undertaken. Consider any particular sensitivity that should be outlined up front.* | Contact with external stakeholders  ……..…………………………………………….  ………………….……………………………….. |
| Other organisations  ……..…………………………………………….  ………………….………………………………... |
| List of Committees  ……..…………………………………………….  ………………….……………………………….. |
| 🖵 | Agency Media Policy and DPAC Media and Communication Policy  *Provide an overview of the Departments and DPACs media policy and meet relevant staff.* | Electronic Communication protocols  Agency Media Policy  DPAC Communication templates/policy |
| **COMPLETED:** |
| **DATED:** |

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| **WITHIN THE FIRST 6 MONTHS YOU SHOULD** |
| **KNOW MORE ABOUT YOUR ROLE AND CAREER DEVELOPMENT OPPORTUNITIES** | | |
| Item and detail | | Suggested content |
| 🖵 | More about your Role  *Continue to use the Officer’s Statement of Duties and the Senior Executive Leadership Capability Framework as a reference point with the Officer’s ongoing context.* | Work plan priorities  Specific projects / outputs / resources  Your Team  Performance Management of your team  Expectations  Professional Development |
| 🖵 | Agency Performance Management Guidelines and Procedures  *Outline of the Agency’s Performance management and development arrangements that apply to all Senior Executives and equivalents. The Agency’s Performance Management Framework is designed to support the business planning process and provide a clear link between an employee’s performance and development and the achievement of the Agency’s strategic direction*. | Performance Management  Performance bonuses  Eligibility for assessment |
| 🖵 | Agency Leadership behaviours  *Outlining that there are expectations at Senior Executive levels other than just any technical aspects of the role – leadership, modelling behaviour, working collaboratively across Government.*  *The Senior Executive Leadership Capability Framework defines these expectations and provides expected behaviours.* | Discuss the Senior Executive Leadership Capability Framework  Discuss Agency Values |
| 🖵 | Career Development Opportunities  *Discuss as part of the Performance Management process the Officer’s learning and development needs – identifying any learning and development needs in relation to the individual’s immediate role. Conversations should also include future career aspirations and goals.* | Understand State Service Vacancy Control policy as it applies to the Senior Executive cohort  Understand the Tasmanian State Service *Rotation and Mobility Policy*  Understand blended Learning Opportunities (70:20:10) available – 70% on the job experience; 20% mentoring and coaching; 10% courses and programs) available |
| 🖵 | Broader whole-of-service Leadership initiatives  *Outlining that there are expectations at Senior Executives levels and that the Office is appointed to the State Service – not an Agency.* | Understand the *Senior Executive Leadership Capability Framework* and Behavioural descriptors  Understand the Tasmanian State Service *Rotation and Mobility Policy Framework*  [Understand the *Talent Management and Succession Planning Strategy – under development through SSMO]*  Have awareness of Australian and New Zealand School of Government (ANZSOG) Scholarships –Refer to State Service Management Office website. |
| **COMPLETED:** |
| **DATED:** |