[insert company logo]

**[insert company name]**

**[employee/freelance/trustee]**

**INDUCTION PACK**

***This template has been created by Unlimited Theatre. It has been created to suit the needs of our organisation and is by no means an extensive checklist for all organisations. We hope you find this useful in creating your own induction packs and encourage you to adapt and expand it to meet the unique needs of your organisation and workforce.***

*Where applicable, we recommend creating individual packs tailored to*

*employees, freelance associates and Board members.*

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[employee/freelance/trustee] **INDUCTION FORM X**

**WELCOME**

*Use this space to tell the new member of your workforce how excited you are for them to join the team! Tell them about what your pack includes and give them contact details for a staff member that they can speak to should they have any questions.*

**INTRODUCTION TO [insert company name]**

*Use this space to tell the individual about your company:*

* *The history of the company – where you started and how you got to where you are today*
* *Your vision, mission, and values*
* *The company ethos and expectations for behaviour*
* *Company status, primary funder and charitable objectives (if applicable)*

**CURRENT PROJECTS**

*Here’s where you can bring the individual up to speed on what you’re currently working. At Unlimited, we’ve split this into:*

* *What we’re currently delivering/touring*
* *What projects are in/going into development*

*It’s up to you how much detail you’d like to go into here – you could link to other documents, webpages, blog posts or even available footage of shows or rehearsals.*

*(N.B. we recommend including read/watch times for anything you link to)*

**COMPANY STRUCTURE**

*This is where you can give an idea of the day-to-day workings of the company and allow them to get to know the team.*

*We recommend including:*

* *A diagram showing your formal company structure*
* *A bio for each employee which includes their working hours/pattern, overview of their role, any relevant information about their practice and/or other jobs/commitments they have outside of the organisation, a brief overview of their previous experience and a little something about what they like to do outside of work*
* *Introductions to any freelance associates they may work with as part of the role*
* *Clarify who the individual’s line manager / point of contact is at the company and who they’ll be working with as part of their role*
* *If you have a Board or stakeholder group, a bio for each member*
	+ *you will want to decide how relevant this information is depending on the individual’s role – for example, this could be a lot to take in for a freelancer who may only be working with you for a short period of time.*

**WHERE TO FIND US**

*Depending on whether your workforce member will be fulfilling their new role at a specific location or remotely, we recommend you use this section to give information on:*

* *Office/venue address(es) – including a map and information/links for travel, details on access and facilities*
* *Company contact details*
* *Working from home practices*
* *An idea of a ‘normal week’- at Unlimited we have a mix of office and remote workers so we use this space to explain who works where.*

**BEFORE YOUR FIRST DAY**

*Provide a step-by-step explanation of everything that will happen / is required before their first day with you.*

*We give the individual a breakdown of what documents they’ll receive, clearly stating what they need do with them. We also include approximate read/watch times so they can plan this time into their schedule.*

*Advice: Where possible, we try to link to documents within the pack – this minimises attachments in emails, keeps everything in one place and allows us to update the documents, meaning that whenever the individual uses the link in the future, they will always see the most up to date version (perfect for ever-changing policies and procedures!).*

*We also recommend giving the individual an idea of when you’ll be getting in contact with them, what information you’ll be asking for and providing a list of anything they may need to bring on their first day. Again, give contact details for someone they can contact with questions.*

*You can also use this section to provide an initial reading list and information on what they can expect on their first day.*

**DATES FOR YOUR DIARY**

*List any relevant upcoming dates – this could be company/Board meetings, training, tour dates, social events etc.*

USEFUL LINKS

*This is where you can provide links to anything that will help the individual get to know the company and the work better. We recommend trying to tailor these to the role and to ensure the list remains manageable – a long list of links can feel a bit overwhelming!*

*We include:*

* *Website addresses (giving mention to specific pages)*
* *unREVIEW (Unlimited’s annual report)*
* *Social media accounts*
* *Flickr*

**[employee/freelance/trustee] INDUCTION FORM**

*Before the individual launches into completing the below induction form, we recommend you include copy here to:*

* *Give an explanation as to why you would like to ask these questions*
	+ *For us it’s about creating a space for open dialogue, getting to know the person and ensuring that we create and enable a welcoming and inclusive environment where everyone can be their best self.*
* *Stress that they are all optional questions, and that the individual should only answer them if it feels appropriate and comfortable to do so*
* *Explain what you’ll do with the information (i.e. will there be the possibility of a follow up meeting to discuss their responses?)*
* *State where their form will be stored and who will have access to it – give the individual the option to say if they would like the form to only be seen by specific people*
* *Give contact details should they wish to discuss any element of the form with you and provide instructions on who to send the completed form to*

*In addition to the above, in our own pack we explain that it is a working document being developed in collaboration with our workforce and that there will be opportunity for them to provide their own feedback. We also notify the individual that they can update the form and re-send it to us at any time. In any case, employees will be prompted to do so as part of their annual staff review.*

***Please edit the questions in this form to suit your own organisation***

|  |
| --- |
| **ABOUT YOU** |
| **Full name:** |  |
| **Nickname:***(if preferred)* |  |
| **Preferred pronouns:** |  |
| **Date of birth:** |  |
| **Ethnicity:***(how you prefer to identify)* |  |
| **Sexual orientation:***(how you prefer to identify)* |  |

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| **ACCESS** |
| *If you already have an ‘access rider’ please send it through to us. If this is the first time you’re coming across these and would like to find out more, our friends at the other Unlimited have put together a guide:* [*https://weareunlimited.org.uk/creating-your-own-access-rider/*](https://weareunlimited.org.uk/creating-your-own-access-rider/) |
| **Do you have any health conditions, illnesses or disabilities that you’d like us to be aware of?** *(please use this space to give us as much information as you wish to – feel free to include links to resources or send us additional attachments when returning this form)* |  |
| **Is there anything we can do or provide to remove any barriers to you working comfortably and efficiently?***(e.g. access to specific equipment/software, physical accessibility requirements, flexible working hours - anything that would ease any difficulties or challenges you may face in working with us.* *Your request(s) can be, but absolutely do not need to be, in relation to a condition, illness or disability identified in the question above)*  |  |
| **Is there anything else you’d like to bring to our attention?** |  |

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| **YOUR COMMITMENTS & PREFERENCES** |
| **For your work with us, do you have preferred working days or times?***(Please let us know of any other commitments - e.g. jobs, caring responsibilities - so we’re aware of your availability)* |  |
| **Your role may occasionally present work or opportunities to attend events outside of regular working hours. Is this possible? Are there any barriers or considerations you’d like us to be aware of in you navigating this?** |  |
| **On the rare occasion that we need to contact you urgently outside of working hours, what would be the best way for us to do this?** |  |
| **If your role requires working away from home (e.g. in the company office, rehearsal spaces, on tour) do you have any requests for on-site facilities that you’d like us to know about?***(you may have covered this already in a previous answer, but we’d like to give the opportunity to raise anything you may not have already mentioned – this could be access to a prayer room, quiet space, kitchen equipment etc.*  |  |
| **What is your preferred method of contact?** *(We primarily use* [*Slack*](https://slack.com/intl/en-gb/help/articles/115004071768-What-is-Slack-) *and email but we welcome any preferences outside of these)* |  |
| **If working away from home, do you have any preferences with regards to travel and accommodation?** |  |
| **We like to create opportunities for our workforce to socialise and get to know each other outside of the workplace. We do not wish to make any assumptions on your social preferences, so please use this space to tell us anything you would like us to know or arrange to ensure you are comfortable in any social environment we create.** |  |

*Please proceed to the next page*

|  |
| --- |
| **YOUR WELLNESS ACTION PLAN** |
| Using resources and template questions provided by MIND, we want to give each individual we work with the opportunity to develop a personalised Wellness Action Plan (WAP). Completing the below questions will help us to better understand your needs, experiences and how to support your mental health. The questions are optional. To help you understand and answer the questions, we’ve pulled out key definitions and examples from [MIND’s guide about WAPs](https://www.mind.org.uk/media-a/5760/mind-guide-for-employees-wellness-action-plans_final.pdf) and included them on a sheet at the end of this form (RT: 5 mins). We highly recommend reading the full guide if you have time as this includes useful case studies and tips for staying well at work.As a result of completing the below questions, we may schedule a follow up meeting with you to discuss any reasonable adjustments we’re able to put in place. |
| **Do you have a mental health problem that you would like us to be aware of?** |  |
| **What helps you stay mentally healthy at work?***(e.g. adequate breaks, exercise, working environment, social opportunities)* |  |
| **What could we do to proactively support you to stay mentally healthy at work?** *(e.g. regular feedback, check ins, flexible working patterns)* |  |
| **Are there any situations at work that can trigger poor mental health for you?***(e.g. conflict at work, organisational change, tight deadlines, heavy workload)* |  |
| **How might experiencing poor mental health impact on your work?***(e.g. difficulty with making decisions and prioritising, lack of concentration, experiences of drowsiness, confusion or headaches)* |  |
| **Are there any early warning signs that we might notice when you are starting to experience poor mental health?***(e.g. change in demeanour, withdrawing from colleagues, changes to normal working patterns)* |  |
| **What support could be put in place to minimise triggers or help you to manage the impact?***(e.g. additional check ins, signposting to resources, guidance on prioritisation or workload, flexible working patterns)* |  |
| **Are there elements of your individual working style or temperament that is worth us being aware of?***(e.g. preference for face-to-face or email contact, changes to energy levels based on time of day, need for quiet reflection time between meetings and creative tasks, negotiation on deadlines, access to a mentor for questions, an agreed plan of work)* |  |
| **If we notice any early warning signs that you are experiencing poor mental health, what would you prefer that we do?***(e.g. talk to you discreetly, contact someone that you have asked to be contacted)* |  |
| **What steps can you take if you start to experience poor mental health at work? Is there anything we need to do to facilitate them?***(e.g. take a break from your desk, ask a manager or colleague for support, alter your working pattern)* |  |
| **Is there anything else you would like to share?** |  |

|  |
| --- |
| **EMERGENCY CONTACT** |
| Primary Contact |
| **Name:** |  |
| **Phone number:** |  |
| Secondary Contact |
| **Name:** |  |
| **Phone number:** |  |

|  |
| --- |
| **OTHER INFORMATION** |
| Did you find completing this form useful? If no, why?*We welcome any suggestions for alterations or additional questions that could be added to this form.* |  |
| Please use this space to tell us anything else you’d like us to be aware of.  |  |

**WELLNESS ACTION PLAN**

Key information taken from [MIND’s WAP guide](https://www.mind.org.uk/media-a/5760/mind-guide-for-employees-wellness-action-plans_final.pdf)

**What is a Wellness Action Plan (WAP)?**

WAPs are a personalised, practical tool we can all use – whether we have a mental health problem or not – to help us identify what keeps us well at work, what causes us to become unwell, and how to address a mental health problem at work should you be experiencing one. It also opens up a dialogue with your manager or supervisor, in order for them to better understand your needs and experiences and ultimately better support your mental health, which in turn leads to greater productivity, better performance and increased job satisfaction.

The WAP should be written and owned by you, expressing your own personal choices, reflecting your voice, your personal experience and your needs. Your manager’s role is to discuss the plan with you and provide support, including guidance on what is possible for any reasonable adjustments. It should be a collaborative process, but led by you.

**Definitions**

**Mental health -** We all have mental health, just as we all have physical health, and how we feel can vary from good mental wellbeing to difficult feelings and emotions, to severe mental health problems.

**Mental wellbeing -** Mental wellbeing is the ability to cope with the day-to-day stresses of life, work productively, interact positively with others and realise our own potential

**Poor mental health -** Poor mental health is a state of low mental wellbeing where you are unable to realise your own potential, cope with the day-to-day pressures of life, work productively or contribute to a community.

**Mental health problems -** We all have times when we struggle with our mental health, but when these difficult experiences or feelings go on for a long time and affect our ability to enjoy and live our lives in the way we want to, this is a mental health problem. You might receive a specific diagnosis from your doctor, or just feel more generally that you are experiencing poor mental health.

**Common mental health problems -** These include depression, anxiety, phobias and obsessive-compulsive disorder (OCD). These make up the majority of the problems that lead to one in four people experiencing a mental health problem in any given year. Symptoms can range from the comparatively mild to very severe.

**Less common mental health problems -** Less common conditions like schizophrenia or bipolar disorder can have a big impact on people’s lives: it may be harder to find appropriate treatment and, as understanding tends to be lower, people may face more stigma. However, many people are able to live with and recover from these diagnoses and manage the impact on their life well.

**Work-related stress -** Work-related stress is defined by the Health and Safety Executive as the adverse reaction people have to excessive pressure or other types of demand placed on them at work. Stress, including work-related stress, can be a significant cause of illness and is known to be linked with high levels of sickness absence, staff turnover and other issues such as increased capacity for error. Stress is not a medical diagnosis, but severe stress that continues for a long time may lead to a diagnosis of depression or anxiety, or more severe mental health problems.

**Reasonable Adjustments**

A reasonable adjustment is an alteration that an employer makes which enables an employee to continue with their duties without being at a disadvantage compared to others. Under the Equality Act 2010, there is a legal duty on employers to make these reasonable adjustments for employees with a disability. Whether a mental health problem is defined as a disability or not, employers are encouraged to make adjustments for staff who are experiencing mental health problems.

The types of reasonable adjustments commonly made for people experiencing a mental health problem depends on the symptoms being experienced and should be tailored to suit you. It also depends on the organisation’s resources, so your manager needs to be aware of what the organisation is able to provide and what is defined as ‘reasonable’ when entering into a conversation.

**Examples of reasonable adjustments (these are not exhaustive lists)**

Support from the Manager:

* providing written instructions for someone whose anxiety affects their memory
* providing workload support and help with prioritising work
* agreeing the type of work you can handle whilst you are on a phased return to work
* increasing frequency of catch-ups or 1-to-1’s
* arranging mediation if there are difficulties between colleagues
* appointing a ‘buddy’ or ‘mentor’ outside the usual management structure who can show the new employee the ropes and help them settle in

Flexible working patterns:

* flexible working hours, for example, allowing a person who has difficulty travelling in crowded trains to start early and finish early in order to avoid the rush hour
* allowing someone who is starting or reducing medication to have a day off if they are experiencing side effects, such as drowsiness
* enabling a person to arrange their hours to permit them to attend a weekly therapy session
* allowing someone to take time out of the office when they became particularly anxious
* enabling part-time working or job-share arrangements for someone who is unable to work full-time
* enabling someone to arrange their annual leave so that they have regularly spaced breaks throughout the year
* allowing someone who finds the pressure of large meetings very difficult to have at least 15 minutes between meetings
* a gradual return to work after periods of sickness absence
* the possibility of working from home, reduction in hours or relief from some responsibilities to prevent the person having to take time off sick during fluctuations in their condition

Changes to the physical environment:

* arranging for someone who finds the distractions of an open-plan office detracts from their work performance to have a desk in a quieter area
* moving a person’s workstation so that they are not placed in very busy areas or with their back to the door
* provide a quiet space for breaks away from the main workspace
* allow for increased personal space