

New trainer and assessor induction checklist



A manager's guide to supporting new trainers and assessors during their first 3 months in mining and automotive Vocational Education and Training (VET) contexts.

Part of the AUSMASA Trainer and Assessor VET Career Framework

About this checklist

This checklist is for managers and program leaders who support a new trainer or assessor. It covers the first 3 months on the job and provides support responsibilities across the following 7 domains:

1. organisation
2. professional identity and transition
3. teaching and assessment
4. Certificate IV in Training and Assessment (TAE) qualification
5. digital capability
6. industry currency
7. wellbeing

Managers/program leaders should work through each section at the appropriate time. Use the note boxes to record what your organisation will do, who is responsible, and any follow-up actions. Not every item will apply in every context.

5 things that matter most in the first 3 months

1. Name the transition

Moving from industry expert to educator involves genuine identity adjustment. Name it explicitly during induction so the new entrant understands what they are experiencing.

2. Mentor from day 1

Making mentoring available from the first day, not after probation, is the single most significant factor in early retention.

3. Stage delivery

Observation and co-delivery before independent delivery reduces early stress and builds confidence more effectively than being placed into full delivery immediately.

4. Delay TAE commitment

Allow the new entrant to settle into the role before commencing formal study. 3 to 6 months is a recommended timeframe.

5. Protect the workload

The first 3 months are the most vulnerable period. An unsustainable early workload is a leading predictor of departure.

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New entrant's name: _____ **Start date:** _____

Manager: _____ **Mentor assigned:** _____

Before they start

Early experiences strongly shape confidence, retention and long-term success in VET. Use this checklist before the new entrant's first day to ensure they feel prepared, supported and welcomed from the outset.

Check	Organisation
☐	Send a welcome message confirming start arrangements, who to ask for and where to go on their first day.
☐	Ensure IT access, email and system logins are set up and ready.
☐	Prepare workspace, access cards and any equipment needed.
☐	Brief the team on the new person starting.
☐	Confirm mentor is identified, briefed and available from day 1
Check	Professional identity and transition
☐	Brief the mentor on the identity transition dimension of their role.
Check	Teaching and assessment
☐	Identify which units or qualifications they will deliver first.
☐	Arrange an observation or co-delivery schedule for the first few weeks.
☐	Prepare training and assessment resources they will need from the start.

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Check	TAE qualification
☐	Confirm whether they hold the TAE, are enrolled, or need to commence.
☐	If they do not hold the TAE, prepare information on your support arrangements.
Check	Digital capability
☐	Identify which systems they will need on Day 1 and arrange orientation.
☐	Identify a digital support contact they can go to with questions.
Check	Industry currency
☐	Note their current industry connections and area of vocational expertise.
Check	Wellbeing
☐	Confirm employee assistance program (EAP) access is available and prepare information to share on Day 1
☐	Schedule the first mentor meeting for day 1 or 2
☐	Plan a reduced delivery load for the first 4 to 6 weeks.

Notes and actions -- before start

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Day 1

First day essentials.

Check	Organisation
☐	Welcome the new entrant personally.
☐	Tour of facilities, including safety maps and emergency procedures
☐	Introductions to team members and key contacts
☐	Confirm IT access is working and walk through essential systems.
☐	Confirm payroll, HR and any administrative requirements.
Check	Professional identity and transition
☐	Name the transition explicitly: entering a second profession, not just a change of workplace.
☐	Introduce the concept of the dual professional role: industry expertise is the foundation, teaching capability builds on it.
☐	Normalise the adjustment period: uncertainty in the first weeks is expected and does not indicate unsuitability.
Check	Teaching and assessment
☐	Walk through the training and assessment resources available.
☐	Explain the assessment requirements and evidence standards for their delivery area.
☐	Confirm the observation or co-delivery arrangement for the first week.
Check	TAE qualification
☐	Confirm TAE status and explain the organisation's support arrangements.
☐	Make clear that the TAE commencement will be planned once they are settled, not in the first weeks.

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☐	Walk through the student management system and any systems needed immediately.
☐	Introduce a digital support contact.
☐	Check digital confidence and note any gaps to address
Check	Industry currency
☐	Explain what vocational currency means in the vocational education and training (VET) context and how the organisation supports it.
Check	Wellbeing
☐	Introduce EAP and explain how to access it.
☐	Introduce a mentor or buddy.
☐	Schedule the first mentor meeting.
☐	Confirm check-in schedule for the first month.

Notes and actions – week 1

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Week 1 and 2

Settling in.

Check	Organisation
☐	Introduce key policies: assessment, compliance, student management, and professional conduct.
☐	Walk through compliance documentation requirements.
☐	Explain the quality and validation cycle and their role in it.
☐	Confirm workload for the coming weeks and check that it is manageable.
Check	Professional identity and transition
☐	Check in on how the transition is feeling.
☐	Mentor to share their own transition experience
☐	Discuss what their vocational expertise brings to the role and how it will be used.
Check	Teaching and assessment
☐	Begin observation of the experienced trainer delivering in their area.
☐	Introduce lesson planning and session structure.
☐	Discuss assessment judgement: what constitutes sufficient evidence.
☐	Begin co-delivery if confidence allows, with mentor support.
Check	TAE qualification
☐	No TAE action required yet unless they are already enrolled.
☐	If already enrolled, confirm workload adjustment is in place.

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Check	Digital capability
☐	Orientation on assessment and compliance systems
☐	Orientation on learning management systems (LMS) or blended delivery tools, if used
☐	Check the administrative digital load and note any friction points.
Check	Industry currency
☐	Discuss how their current industry connections can be maintained during the transition.
☐	Identify any immediate currency risks in their delivery area.
Check	Wellbeing
☐	Wellbeing check-in with mentor: how is the adjustment going?
☐	Check workload is genuinely manageable, not just theoretically manageable.
☐	Address any early stress signals.

Notes and actions – week 1 and 2

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Month 1

Establishing the foundations.

Check	Organisation
☐	Complete any mandatory compliance training.
☐	Confirm timetable and delivery commitments for the coming months.
☐	First formal check-in with manager: role, workload, expectations, support
☐	Review probation expectations and confirm they are understood.
Check	Professional identity and transition
☐	Review how the identity adjustment is progressing.
☐	Address any imposter syndrome signals if present: reinforce that these are normal.
☐	Discuss early wins and what is going well.
Check	Teaching and assessment
☐	Progress to supervised independent delivery in familiar units
☐	Debrief after delivery sessions with the mentor.
☐	Identify any teaching capability development needs.
Check	TAE qualification
☐	If not yet enrolled and the person is settling well, begin planning TAE enrolment.
☐	Confirm workload adjustment arrangements before enrolment proceeds.
☐	Do not proceed with TAE if the person is still feeling unsettled.

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Check	Digital capability
☐	Address any digital gaps identified in the first few weeks.
☐	Confirm the administrative digital load is manageable.
☐	Introduce any remaining systems needed for their role.
Check	Industry currency
☐	Develop a simple currency maintenance plan with the new entrant.
☐	Identify the first currency activity: a site visit, an employer meeting, or an industry network.
Check	Wellbeing
☐	Formal well-being check-in with manager
☐	Review workload design and adjust if needed.
☐	Confirm the mentoring relationship is working and adjust if not.

Notes and actions – month 1

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Months 2 and 3

Building confidence and independence.

Check	Organisation
☐	Review and adjust the workload if needed to allow for the TAE study if it has now commenced.
☐	Confirm the ongoing check-in schedule beyond the induction period.
☐	Begin preparing for the end-of-probation review, if applicable.
Check	Professional identity and transition
☐	Revisit professional identity: how are both the vocational and educator identities developing?
☐	Recognise and name growth since day 1
☐	Discuss what the next phase of the career looks like
Check	Teaching and assessment
☐	Increase independence in delivery across familiar units.
☐	Participate in the validation process.
☐	Identify the next teaching capability development goals.
☐	Consider co-delivery in new or more complex units.
Check	TAE qualification
☐	If enrolled, monitor progress and ensure workload adjustment is maintained.
☐	Connect TAE concepts explicitly to real teaching practice.
☐	If not yet enrolled, confirm plan and timing

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Check	Digital capability
☐	Review digital confidence across all systems in use.
☐	Address any remaining gaps or ongoing friction.
☐	Note any digital support needs going forward.
Check	Industry currency
☐	Complete the first currency activity.
☐	Review the currency plan and adjust.
☐	Discuss industry engagement opportunities available through the organisation.
Check	Wellbeing
☐	End of induction wellbeing review: how is the overall experience?
☐	Confirm a sustainable workload going into the establishing phase.
☐	Confirm mentoring continues as an ongoing relationship, not just an induction activity.
☐	Discuss what support looks like beyond 3 months.

Notes and actions – months 2 and 3

Learn more about the Trainer and Assessor VET Career Framework

Explore more practical tools, guides and resources supporting VET capability, wellbeing, industry engagement and career development