

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

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Check	TAE qualification
<input type="checkbox"/>	Confirm whether they hold the TAE, are enrolled, or need to commence.
<input type="checkbox"/>	If they do not hold the TAE, prepare information on your support arrangements.
Check	Digital capability
<input type="checkbox"/>	Identify which systems they will need on Day 1 and arrange orientation.
<input type="checkbox"/>	Identify a digital support contact they can go to with questions.
Check	Industry currency
<input type="checkbox"/>	Note their current industry connections and area of vocational expertise.
Check	Wellbeing
<input type="checkbox"/>	Confirm employee assistance program (EAP) access is available and prepare information to share on Day 1
<input type="checkbox"/>	Schedule the first mentor meeting for day 1 or 2
<input type="checkbox"/>	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
<input type="checkbox"/>	Welcome the new entrant personally.
<input type="checkbox"/>	Tour of facilities, including safety maps and emergency procedures
<input type="checkbox"/>	Introductions to team members and key contacts
<input type="checkbox"/>	Confirm IT access is working and walk through essential systems.
<input type="checkbox"/>	Confirm payroll, HR and any administrative requirements.
Check	Professional identity and transition
<input type="checkbox"/>	Name the transition explicitly: entering a second profession, not just a change of workplace.
<input type="checkbox"/>	Introduce the concept of the dual professional role: industry expertise is the foundation, teaching capability builds on it.
<input type="checkbox"/>	Normalise the adjustment period: uncertainty in the first weeks is expected and does not indicate unsuitability.
Check	Teaching and assessment
<input type="checkbox"/>	Walk through the training and assessment resources available.
<input type="checkbox"/>	Explain the assessment requirements and evidence standards for their delivery area.
<input type="checkbox"/>	Confirm the observation or co-delivery arrangement for the first week.
Check	TAE qualification
<input type="checkbox"/>	Confirm TAE status and explain the organisation's support arrangements.
<input type="checkbox"/>	Make clear that the TAE commencement will be planned once they are settled, not in the first weeks.

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Check	Digital capability
<input type="checkbox"/>	Walk through the student management system and any systems needed immediately.
<input type="checkbox"/>	Introduce a digital support contact.
<input type="checkbox"/>	Check digital confidence and note any gaps to address
Check	Industry currency
<input type="checkbox"/>	Explain what vocational currency means in the vocational education and training (VET) context and how the organisation supports it.
Check	Wellbeing
<input type="checkbox"/>	Introduce EAP and explain how to access it.
<input type="checkbox"/>	Introduce a mentor or buddy.
<input type="checkbox"/>	Schedule the first mentor meeting.
<input type="checkbox"/>	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
<input type="checkbox"/>	Introduce key policies: assessment, compliance, student management, and professional conduct.
<input type="checkbox"/>	Walk through compliance documentation requirements.
<input type="checkbox"/>	Explain the quality and validation cycle and their role in it.
<input type="checkbox"/>	Confirm workload for the coming weeks and check that it is manageable.
Check	Professional identity and transition
<input type="checkbox"/>	Check in on how the transition is feeling.
<input type="checkbox"/>	Mentor to share their own transition experience
<input type="checkbox"/>	Discuss what their vocational expertise brings to the role and how it will be used.
Check	Teaching and assessment
<input type="checkbox"/>	Begin observation of the experienced trainer delivering in their area.
<input type="checkbox"/>	Introduce lesson planning and session structure.
<input type="checkbox"/>	Discuss assessment judgement: what constitutes sufficient evidence.
<input type="checkbox"/>	Begin co-delivery if confidence allows, with mentor support.
Check	TAE qualification
<input type="checkbox"/>	No TAE action required yet unless they are already enrolled.
<input type="checkbox"/>	If already enrolled, confirm workload adjustment is in place.

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

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Month 1

Establishing the foundations.

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

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

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Months 2 and 3

Building confidence and independence.

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

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