

Manager's Onboarding Guide

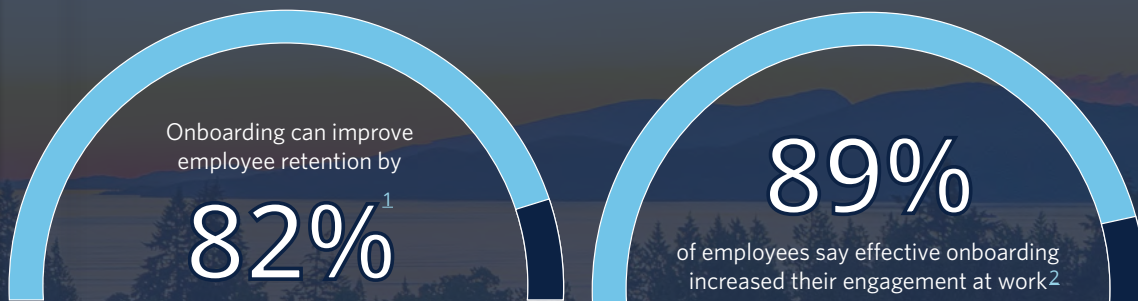


THE UNIVERSITY OF BRITISH COLUMBIA



CONGRATULATIONS ON THE NEW ADDITION TO YOUR TEAM!

The employment agreement is signed, you've confirmed the start date - now it's time to welcome them to the team. The next 90 days are a critical time to set up your new hire for success. This stage of onboarding is the first interaction your new hire has with your team at UBC after the interview process. An effective onboarding process is essential for your new hire to start their new role feeling engaged, productive, and confident.



HOW TO USE THIS GUIDE

This Manager's Onboarding Guide is designed to be a starting point for your local onboarding plan and help guide your interactions as a manager with your new hire during their first weeks.

A helpful onboarding plan will be unique. There may be onboarding resources relevant to your new hire based on their role, team, department or unit, work arrangement and so on.

As their manager, you will know best what will be useful to them.

As you review this guide, review and customize your New Hire Onboarding Checklist template to meet your team's specific needs and provide the checklist to your new hire on or prior to their first day.

You can download the New Hire Onboarding Checklist template available from the [New employee checklist and orientation page](#) on the HR website (CWL required). This template is updated on a regular basis, visit this site to ensure you use the most current version.

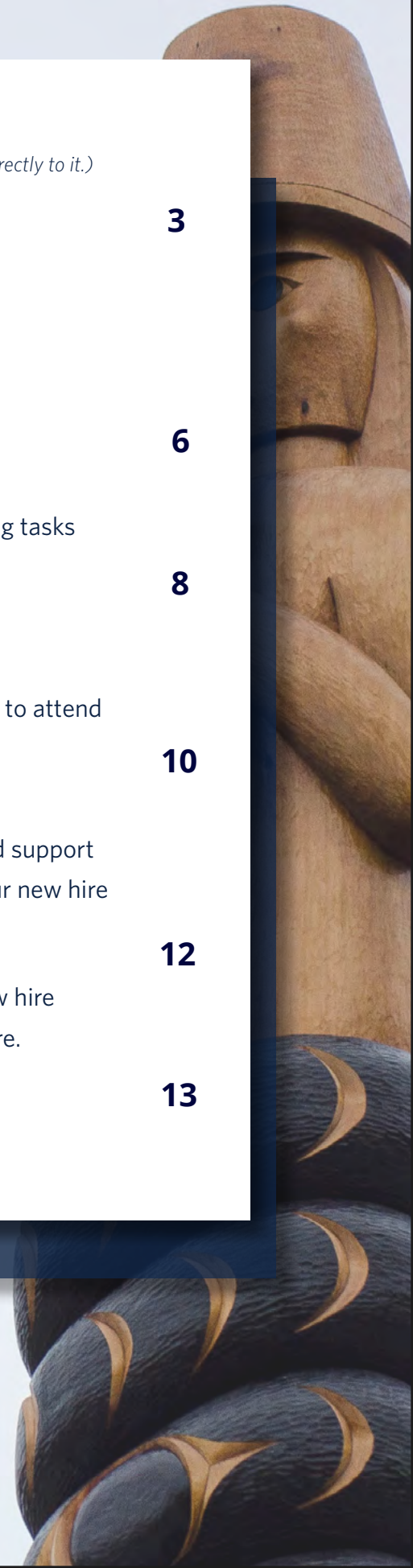


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We acknowledge that UBC’s campuses are situated on the traditional, ancestral and unceded territory of the Musqueam, Squamish and Tsleil-Waututh, and on the territory of the Syilx Okanagan Nations.



Prior to the first day

Consider the following:

1. Is your new hire internal or external to UBC?

Consider how this will inform the level of onboarding and setup required prior to their first day – from accounts setup and systems access to training needs.

2. Does your new hire require additional UBC assets to perform their job?

Be sure to request any equipment and other UBC assets **at least two weeks in advance of their start date** to ensure all required setup is completed by their first day.

3. What specific training, support and resources does your new hire need?

- Will your new hire [manage or lead people](#)?
- Will your new hire have [financial responsibilities](#)?
- Will your new hire have [teaching responsibilities](#)?
- Will your new hire be in a [student-facing role](#)?
- Will your new hire work in a [lab or medical facility](#) with exposure risks?

i. Setting up your new hire's workspace, equipment and access

Request appropriate [IT hardware products](#) and [software licensing](#). If applicable, ensure the devices are [configured for working off-campus](#), including VPN access.

Where applicable, arrange the setup and/or procurement of additional UBC assets that your new hire requires for their job. In some departments, you may be able to arrange these with your department/office administrator. Examples could be:

- I.D. cards, building access cards, keys and codes, or timecards.
- A [UBC Visa card](#)
- Office equipment for remote use (e.g. computer, cell phone, or ergonomic chair and desk.)
- Work tools, materials, or equipment and protective gear.
- Uniforms, security identification, or name tags.

Set up your new hire's workstation and access. In some departments, you may be able to arrange these with your department/office administrator. Examples could be:

- Adding your new hire to appropriate mailing lists and shared mailboxes (request [UBC IT email and mail list services](#) as needed)
- Inviting your new hire to all team meetings and any online channels and shared network drives used by your team for project work and social connection
- Desk phone setup, printer setup, stationary, or desk furniture orders.



ii. Confirming work arrangements with your new hire

Review [Hybrid Work Guidelines](#) before initiating conversation with new hire about work arrangement expectations.

Prepare a personalized welcome email or call your new hire to welcome them and share information about their first day, include work hours, dress code, arrangements for accessing the building, and scheduled plans for their first day.

Ask your new hire if they require any accommodation or accessibility support. Provide them with information about the [Centre for Workplace Accessibility \(CWA\)](#). The CWA is available to support managers and new hires with accommodation and accessibility support to help remove barriers in the workplace.

Provide your new hire with information about [sustainable commute options and campus parking](#) to make their travel to and on campus a breeze on their first day.

iii. Preparing for your new hire's arrival

Customize the New Hire Onboarding Checklist template available from the [New employee checklist and orientation](#) webpage to include any team/department-specific onboarding tasks. In some departments, your local HR may provide a department onboarding checklist to supplement this general checklist.

Create a 30-60-90 Day Plan for your new hire to support employee success. This plan will outline key operational objectives (performance-based) as well as developmental objectives (learning-based) for your new hire to work towards in their first 30 days, 60 days, and 90 days in the role.

Email your team/unit to introduce your new hire. If applicable, also submit an announcement message about your new hire to your department's internal newsletter.

Encourage team members to schedule welcome conversations (virtual or in-person) during the new hire's first few weeks to help build their social networks at UBC. You may also invite team members to prepare a short bio of themselves with a photo to share this with the new hire in your personalized welcome message.

Schedule daily check-in touchpoints with your new hire during their first week to set expectations, provide direction and support them in getting settled into their new role and their new team.



iv. Identify an Onboarding Buddy for your new hire

Select and confirm a colleague within your team or department who can act as the onboarding buddy for your new hire. The onboarding buddy is someone who can support the new hire to build new connections in the department, answer general/routine questions, and be available to check-in regularly throughout their first six months.

NOTE: The onboarding buddy does not need to be in the same role as the new hire. They are not responsible for job training; they are more of a cultural role model and guide for the new hire to help them better integrate into the UBC community.



On the first day

Consider the following:

1. Will your new hire be working in-person, remote, or hybrid?

Consider how this will impact your new hire and the team – from workspace setup to communication and collaboration. For hybrid work information and resources for managers and leaders, visit UBC HR's [Hybrid Work at UBC for Leaders](#) page.

2. How are you going to help your new hire build their social networks at UBC?

UBC's Entrance Survey results indicate that new hires who have more in-person onboarding experiences and support in their first few weeks have higher overall team engagement and feel more settled in their new roles at UBC. Consider how you may want to adjust work arrangements for your new hire during their first months.

i. Meet with your new hire and communicate expectations

Welcome your new hire by introducing them to the team and offering a tour of the workplace (e.g. lunchroom, bathrooms, emergency exits, first aid, and supply stations). If you arranged an onboarding buddy for your new hire, you could have them do the office tour instead when they meet with your new hire.

Discuss work expectations with your new hire. Examples could be:

- Regular work hours, hybrid work arrangements/guidelines, and job description
- Communication and working styles, and expectations for requesting time off
- Overview of technology, software and platforms available and what the team uses
- Organizational structure and team landscape, highlighting areas of collaboration
- Overview of [UBC general required training](#) and other job-specific training offered

Encourage your new hire to engage in in-person meetings and activities on campus within their first month, where applicable. This can include a team lunch, coffee chats with colleagues, orientation and other campus events, and exploring the campus community.

Provide your customized *New Hire Onboarding Checklist* to your new hire.



ii. Ensure your new hire completes required Workday onboarding tasks

Provide time and guidance, if needed, for your new hire to complete their onboarding tasks on Workday. To support new hires with Workday onboarding tasks, UBC's Workday Knowledge Base (CWL required) has step-by-step guides, including:

- [Setting up direct deposit or payment elections](#)
- [Enrolling in benefits and pension](#)
- [Filling out federal and provincial tax elections](#)

Direct your new hire to UBC Finance's Payroll website for additional information about [payroll and personal tax](#). This [payroll calendar](#) includes important dates, including pay dates and deadlines for time entries and approvals.

Direct your new hire to UBC HR's Benefits website for detailed information about [benefits coverage eligibility and enrolment](#) to support them with navigating the benefits enrolment process based on their employment group and personal circumstances.

It is recommended for new hires to consider completing pay-related onboarding tasks **before or on their first day** so that information needed to process their pay is set up correctly for their first pay period. It is recommended that they familiarize themselves and enrol in benefits (if their role is eligible for benefits) before beginning their role to avoid issues with their payroll, tax slips or benefits coverage.

Managers who have employees with outstanding onboarding tasks will receive an [Onboarding Status Summary](#) report from Workday on a bi-weekly basis. If you notice that your new hire has not completed their onboarding tasks and to-do's, provide them with support to ensure they are completed in a timely manner.

If your new hire requires some additional assistance with the Benefits Enrolment Task, we recommend you share the [Benefits Enrolment Guide](#). This guide includes Detailed instructions, FAQs, and a video to help guide new hires through this complex process.



Within the first week

Consider the following:

How will you help your new hire integrate into the UBC community?

One of the top three suggestions from new hires in UBC's Entrance Survey is to provide more opportunities to meet and connect with others across campus and to get involved in the UBC community.

Consider ways you can help your new hire prioritize building cross-campus connections as part of their onboarding at UBC. This may include providing adequate time for them to participate in campus-wide and department-wide orientations.

i. Recommend some essentials for your new hire to get started

Encourage your new hire to [ergonomically set up their workstation](#). Whether they are working in an office, classroom, lab or remote work environment, proper ergonomic design of our workspaces can minimize the risk of a wide range of work-related injuries.

Encourage your new hire to create an [on-brand email signature](#) for work emails.

Encourage your new hire to familiarize themselves with UBC's wellbeing resources, in particular the resources available to help their wellbeing and [mental health](#). Here, they will be able to learn about the Employee and Family Assistance Program and access many of the resources available to help a new hire and their dependents.

ii. Help facilitate the onboarding experience for your new hire

Discuss and provide your new hire with the 30-60-90-Day Plan you have created for them.

Encourage your new hire to review the plan, ask questions and communicate to you what resources and support they may need to help them accomplish the objectives in the plan.

Schedule a team meeting for introductions. Also encourage your team to connect socially with new hire in person or over online collaboration channels.

Ensure your new hire's onboarding buddy has connected with them. Refer to the "Prior to the first day" section about assigning an onboarding buddy to your new hire.



iii. Highlight employee orientations and events for your new hire to attend

Support your new hire in prioritizing department-wide orientation events and meetings, where applicable, to learn about the culture, priorities, and practices of the faculty/department, onboarding resources, and meet with their colleagues. *In some departments, there may be a dedicated HR professional responsible for orientations whom you can connect with regarding your new hire's involvement.*

Encourage your new hire to take part in [campus-wide Orientations & Onboarding](#) to support building cross-campus connections and a sense of community. This includes:

- **New to UBC Orientation Course on WPL Canvas:**
This course is the one place that new hires can find and explore everything they need to know about UBC, including campus resources, services, information, and community.
- **Welcome to UBC Staff Orientation:**
This event welcomes new staff to UBC with speakers and activities to learn more about UBC and our priorities, ways to be engaged in the campus community, and the opportunities available.
- **New Faculty Teaching Orientation:**
Hosted annually, this event welcomes and supports new faculty to learn about the academic culture, policies and practices, and resources available to support their teaching, research and service.
- **Benefits@UBC Webinar for Faculty and Staff:**
This webinar helps new hires learn which benefits they are eligible for and how to access them including Extended Health and Dental, Life Insurance, EFAP, and Tuition Waivers.

Within the first month

Consider the following:

How can you and your team help your new hire get settled into their role?

One of the top three suggestions from new hires in UBC's Entrance Surveys is to provide more job-specific onboarding including 1:1 peer training, job shadowing opportunities, and in-depth training documentation for future reference. Consider how you and your team can help the new hire learn their job efficiently and effectively.

How often will you check in with your new hire?

Checking in regularly with your new hire is helpful as they are settling into their new role.

i. Have regular check-in conversations with your new hire

Schedule regular one-on-one check-in conversations with your new hire to provide direction, set goals, share expectations, and discuss performance in a timely manner.

A recommended check-in schedule is as follows:

- Weekly check-ins within their first month
- Weekly or bi-weekly check-ins within their first three months (or ongoing)
- Both a 6-month and 1-year performance review discussion

Some important conversations to have with your new hire include:

- Seeing how your new hire is transitioning into their new role.
- Introducing the top priorities of the new hire's role and where they should be focusing their efforts to start. Discuss ongoing projects and progress.
- Sharing the team's strategic priorities and goals, and how the new hire also contributes to these. Explain how the team's goals and strategic priorities help to achieve the goals within UBC's Strategic Plan.
- Check in to see how your new hire is tracking towards their performance goals. Discuss performance and provide feedback where appropriate.





ii. Set your new hire up for success with additional guidance and support

Review the performance conversation process with your new hire. Together, identify and set performance goals for the year that are reasonable and achievable. If the new hire has direct reports, review their responsibilities in goal setting and the performance conversation process.

Provide role-specific information and documentation for your new hire that they can maintain for future reference and review this documentation with them where needed. This may include transition documents from their predecessor in the role.

Share team administrative processes and procedures (e.g. sick leave, vacation and attendance tracking, purchasing, etc.). The CWA is available to support managers and new hires with accommodation and accessibility support to help remove barriers in the workplace.

Have team members schedule peer-instructional sessions to train or transfer knowledge on relevant applications and processes.

iii. Share UBC's strategic plans, policies and procedures with your new hire

Provide your new hire with time to become familiar with the following plans:

- [UBC's Strategic Plan](#)
- [Focus on People](#)
- [Strategic Equity & Anti-Racism Framework](#)
- [Indigenous Strategic Plan](#)
- [Wellbeing Strategic Framework](#)
- [Climate Action Plan](#)

Provide your new hire with time to review the following policies and procedures:

- [UBC Statement on Respectful Environment](#)
- Policy GA4 - [Records management](#)
- Policy SC1 - [Health and Safety](#)
- Policy SC5 - [Snow](#)
- Policy SC7 - [Discrimination](#)
- Policy SC13 - [At-Risk Behaviour](#)
- Policy SC14 - [Information Systems](#)
- [Security Standards](#)



Within the first three to six months

Consider the following:

How can you support your new hire's continued learning and development?

Based on responses in UBC's Entrance Surveys, the top two reasons that influenced their decision to join UBC are career progression opportunities and learning and professional development opportunities.

i. Discuss learning and professional development with your new hire

Share learning and professional development opportunities at UBC with your new hire and encourage them to access available resources at UBC. Examples include:

- [Professional development funding](#)
- [Tuition waiver benefits](#)
- [Coaching services and solutions](#)
- [Other career development programs and resources](#)
- [Indigenous Learning Pathways \(Indigenous-focused learning\)](#)

Prepare your new hire for a [performance conversation](#) (CWL required) within their probationary period to identify areas for growth and goals. This process should be largely driven by the new hire, with the supervisor as the coach and partner.

ii. Evaluate the success of your onboarding plan for your new hire.

Remind your new hire to complete the **30-Day and 3-month Entrance Surveys**. These surveys will appear in their Workday inbox as part of their onboarding tasks. Feedback from faculty and staff in these Entrance Surveys are aggregated and will help inform and shape ongoing improvements to UBC onboarding programs and processes.

Gather anecdotal feedback from your new hire about their onboarding experience and evaluate your onboarding plan. Some questions to consider may include how well their onboarding buddy is supporting their integration into the UBC community and how well the job-specific training and documentation provided are supporting their integration into the role.



Important Contacts

- If your new hire has issues with pay, benefit enrolment, pension enrollment, encourage them to contact the [Integrated Service Centre](#) for troubleshooting or support.
- For questions about eligibility or benefits coverage, visit hr.ubc.ca/benefits, or [connect with a benefits specialist](#).
- If you or your new hire have questions about orientations resources and supports at UBC, reach out to workplace.orientations@ubc.ca. We would also love to hear your feedback on this resource.
- For workplace accommodation and accessibility support, contact the [Centre for Workplace Accessibility](#) and speak confidentially with a Workplace Accessibility Specialist by phone at 604 822 8139 or by email at workplace.accessibility@ubc.ca.
- The [Sexual Violence Prevention and Response Office](#) (SVPRO) offers confidential support for those who have been impacted by any form of sexual or gender-based violence, harassment or harm, regardless of where or when it took place.

References

1. <https://b2b-assets.glassdoor.com/the-true-cost-of-a-bad-hire.pdf>
2. <https://www.bamboohr.com/blog/onboarding-infographic>
3. <https://enboarder.com/blog/employee-onboarding-new-hire-retention-turnover-rates/#:~:text=In%20a%20recent%20study%20by,pre%2Dboarding%20or%20onboarding%20 process.>