Onboarding Colleague Program Guidelines

One-on-one peer guidance during the onboarding process can provide much-needed support to new staff and faculty members as they navigate their new role and work environment. Through UBC's Entrance Surveys, new hires consistently highlight having an onboarding colleague as an important component of their onboarding experience and sets them up for success at UBC.

While supervisors play a critical role in the onboarding process, **Onboarding Colleagues can lighten the load on supervisors**. Through personalized support, guidance, and sharing of institutional knowledge, Onboarding Colleagues are experienced colleagues who are paired with a new hire to facilitate a smooth and enriching transition during their first few months.

PURPOSE OF THE GUIDELINES

These guidelines aim to support department administrators and hiring managers with developing and facilitating an informal onboarding colleague program within your department, including further resources for peers and managers who are critical to the success of the program.

You are encouraged to use and **tailor these institutional guidelines** to best align with your department's contexts and practices.

This localized approach ensures that the program is adaptable to the manager's onboarding plan and **complements other onboarding and job training activities** being arranged by the manager.

This program is intended to be primarily **self-directed** between the Onboarding Colleague and the new hire, as every new hire will have unique needs, work arrangements, and ways of learning.

BENEFITS OF PROGRAM

- **New Hire Integration:** Having a designated point of contact for support with understanding norms and procedures helps new hires integrate into the team and UBC more effectively.

- **Enhanced Engagement:** Personalized support and a friendly face can reduce feelings of overwhelm or isolation when navigating a new and unfamiliar work environment, leading to higher engagement, job satisfaction and retention.

- **Increased Productivity:** By answering questions that arise and guiding new hires to resources early on, colleagues can help new employees become productive more quickly.

- **Professional Development:** Being an Onboarding Colleague can provide employees with an opportunity to strengthen their leadership competencies, leading to higher engagement.

- **Collaboration:** By pairing new hires with Onboarding Colleagues from different units, all participants develop a support network outside of immediate work colleagues, and gain exposure to new ideas, perspectives, and opportunities for future collaborations.

CONSIDERATIONS FOR WHEN TO ASSIGN AN ONBOARDING COLLEAGUE

At the hiring manager's discretion, any new faculty, staff or student employee at UBC can be assigned an Onboarding Colleague regardless of their position. However, the following considerations can help managers decide when assigning an Onboarding Colleague would be most ideal in terms of the return on investment of time and resources.

Consider assigning an Onboarding Colleague to your new hire if they:

- Are hired into an ongoing or fixed term position/appointment that is 6 months or longer
- Are working full-time hours or part-time with more than 17.5 hours per week with UBC
- Are hired externally or are internal transfers from a different Faculty/VP portfolio

SELECTION CRITERIA FOR ONBOARDING COLLEAGUES

Consider the characteristics below when selecting an Onboarding Colleague for your new hire:

1. **Institutional knowledge:** Has a good understanding of UBC's and the department's relevant policies, procedures, and organizational culture
2. **Related experience:** Has at least 1 year of experience in a similar or related role within the Faculty or VP Portfolio (e.g. the individual can be from a different unit within the portfolio)
3. **Strong interpersonal skills:** Is a good communicator and listener who demonstrates professionalism, empathy and diplomacy
4. **Commitment / Enthusiasm:** Is willing and able to take on the role for at least 6 months, and has a positive attitude and genuine interest in supporting and guiding others
5. **Positive role model:** Is a strong performer who exemplifies UBC's values

SETTING UP AN ONBOARDING COLLEAGUE

- Identify the tasks that the onboarding colleague is responsible for.
- Send an email to the onboarding colleague <u>after the new hire has signed their offer letter</u>. The email should communicate the following:
  - Invitation to serve as an onboarding colleague for the new hire's first six months
  - New hire's name, start date and role overview
  - Overview of the time commitment and responsibilities as an onboarding colleague
  - Invitation to a 30-minute meeting to discuss the role and what to expect* (if this is the first time you are inviting this onboarding colleague)
- Inform the new hire about their assigned onboarding colleague in the welcome email.

*A preparatory 30-minute meeting allows the hiring manager and onboarding colleague to review the role and discuss expectations. The conversation should focus on the onboarding colleague's level of commitment (considering their workload), information about the new hire, available UBC resources and any other relevant details. This meeting offers an opportunity for the onboarding colleague to raise any concerns or questions, and better understand how they can support the new hire.

ROLE OF THE DEPARTMENT ADMINISTRATION

In departments that have a formal peer program as part of its onboarding process, department administrators play a key role in maintaining program guidelines, providing administrative support to implement the program, and gathering feedback for continuous improvement.

Some responsibilities of the department administrator may include:

- Creating and regularly updating departmental procedures and guidelines for the program, such as program expectations, timelines, and objectives
- Developing and sharing resources for Onboarding Colleagues and hiring managers, such as check-in conversation guides, checklists, and best practices
- Promoting the program internally to ensure hiring managers are aware and actively participate, and addressing inquiries from program participants
- Tracking program participation and other relevant metrics, which may include ensuring that no one Onboarding Colleague is matched with too many new hires at the same time
- Collecting feedback from new hires, Onboarding Colleagues and hiring managers about the program to identify areas for improvement, and making adjustments where necessary
- Providing feedback or suggestions, if any, to Central HR on these institutional guidelines

ROLE OF THE HIRING MANAGER

Hiring managers are ultimately responsible for identifying and assigning Onboarding Colleagues to their new hires and ensuring that the new hires are adequately supported as they navigate their new work environment.

Even if your department does not have a formal peer program in place as part of its onboarding process, you as the hiring manager can still arrange to match your new hire with another colleague in a similar or adjacent role. This may involve liaising with other unit heads/managers.

Note: The Onboarding Colleague is _not_ responsible for job training or performance management.

Some responsibilities of the hiring manager may include:

- Identifying and assigning a suitable Onboarding Colleague for your new hire, based on their experience, role compatibility, and interpersonal skills
- Liaising with other unit heads/managers if the identified Onboarding Colleague is from a different unit, to ensure they are aware and accepting of the arrangement
- Facilitating an introduction between the new hire and their assigned Onboarding Colleague, clearly communicating the role and expectations of the Onboarding Colleague
- Sharing resources developed by the faculty/department to guide the engagement between the Onboarding Colleague and the new hire
- Checking in periodically with the new hire and/or Onboarding Colleague to ensure the engagement is progressing smoothly, addressing questions or concerns that may arise

ROLE OF THE ONBOARDING COLLEAGUE

The onboarding colleague is responsible for providing personalized support to the new hire and ensuring a smooth transition into a new role and environment. The role of an onboarding colleague can be categorized into **Welcome, Guidance and Support,** and **Encouragement**.

The assigned onboarding colleague is likely to be in a similar job role as the new hire to provide the best support. The onboarding colleague is expected to be available to greet new hires during the first week, engage in active listening, act as a role model, create a safe environment, and encourage and inspire the new hire. It is important to keep conversations with the new hire confidential.

Welcome

Some responsibilities of the onboarding colleague include:

- Providing a warm welcome and being available to meet with new hires during the first week
- Introducing the new hire to team members and employees in other units with whom they will have contact
- Offering the new hire a campus and/or office tour (lunchroom, bathroom, safety exits, etc.)
- Helping the new hire to understand the department's culture, processes, expectations and opportunities, and including them in events and opportunities
- Assisting the new hire when they have questions about setup, if applicable.

It is recommended to communicate the best ways to keep in touch on the first day of onboarding.

Guidance and Support

Some responsibilities of the onboarding colleague include:

- Answering questions regarding departmental procedures and/or campus-wide practices
- Assisting with onboarding tasks and connecting the new hire with appropriate resources
- Regularly checking in with the new hire to address any concerns and provide constructive feedback (a weekly meeting for 15-20 minutes for the 1-2 months is recommended).
- Providing coaching and guidance on workplace practices, acronyms, and traditions

Encouragement

Some responsibilities of the onboarding colleague include:

- Supporting the new hire to build strong confidence and engagement in the new role
- Introducing the new hire to other employees to facilitate integration and networking
- Helping the new hire to identify professional development goals and strengths
- Providing a safe space where the new hire can bounce off ideas or feedback (advice is not always needed or desired)
- Assisting with skill development and connecting the new hire with resources
- Providing a space for reflection with the new hire as they move beyond onboarding

ROLE OF THE NEW HIRE

The new hire is encouraged to fully utilize and benefit from the onboarding buddy program. It is an equal responsibility and effort for the new hire to take the initiative and proactively engage with the onboarding colleague.

Some of the responsibilities and important actions include:

- Actively engaging with the onboarding colleagues and other team members (making an effort to connect and participate in team meetings)
- Asking questions and seeking assistance
- Setting goals and identifying strengths and areas of improvement
    - Creating SMART goals will help the new hire identify barriers to goal achievement and potential solutions. It is highly recommended to actively consider what the new hire wants from the onboarding colleague and communicate the objectives clearly.
- Maintaining openness to suggestions and eagerness to acquire knowledge.
    - Take notes and pose non-urgent questions during the regular check-ins
    - Prepare meeting agendas and questions prior to the meeting
    - Actively seek information and take responsibility in own learning progress

Considerations:

- It is important to keep conversations with the onboarding colleague confidential.
- The relationship extends beyond the onboarding colleague, the new hire is encouraged to seek diverse perspectives and guidance from other employees.

CONSIDERATIONS AND ADJUSTMENTS FOR THE PROGRAM

External Hires and Internal Hires

External hires may require more support around setups, university resources and campus navigation compared to internal hires. In this instance, take a moment to reconsider the responsibilities and tasks of the onboarding colleague. For the internal hires, the onboarding colleague can direct their focus on providing cultural and team integration support rather than administrative support.

Cohorts and Partnerships

If there are multiple new hires joining around the same time, consider creating a cohort with a single assigned onboarding colleague. Instead of having 1:1 meetings, consider setting up a general meeting for all the new hires to ask any questions.

If the new hire is joining a newly-formed team with no potential onboarding colleagues, consider collaborating with another team that performs a similar function as your team. This will help the team to develop networks across the unit/team and receive support from another team.

Onboarding Colleague Checklist

First day:

- ☐ Make sure that the new hire's workplace is clean and complete
- ☐ Welcome the new hire on the first day
- ☐ Offer to provide an office and/or campus tour (lunchroom, bathroom, safety exits, etc.)
- ☐ Introduce the new hire to team members and other employees at the office
- ☐ Connect the new hire with the appropriate resources and individuals to address their needs
- ☐ Discuss the department's culture, process, and opportunities
- ☐ Communicate the best ways to keep in touch for the next few months (email, Teams message, phone)

First Week:

- ☐ Answer any questions from the new hire (It is not necessary for the onboarding colleague to be able to answer all questions. If you do not know the answer, connect the new hire with the appropriate resources or person).
- ☐ Set up regular check-ins (Recommended: weekly 15-20 minutes meeting) and address any concerns and questions. Some important topics include:
  - o Onboarding needs and administrative support
  - o Further discussion and coaching of work expectations and best practices
  - o Ongoing projects and priorities for the role
  - o The team's strategic goals and culture
  - o Professional development journey and Performance goals
  - o Workplace accommodations (connect the new hire to the Centre for Workplace Accessibility if needed).
  - o Employee group and collective agreement
  - o Social and networking opportunities
- ☐ Inform the new hire of campus-wide or portfolio-wide orientations programming and events, such as the Welcome to UBC Orientation, the New to UBC Connections Program, and the You@UBC Professional Development Orientation.
- ☐ Inform and invite the new hire of team meetings, lunch and departmental socials

First to Sixth month:

- ☐ Continue to hold weekly check-ins and provide suggestions, ideas and/or feedback (from the third month onwards, the cadence can change to bi-weekly or monthly).
- ☐ Encourage the new hire to connect with other employees and help facilitate new connections
- ☐ Continue to offer coaching and a safe space for the new hire to bounce off ideas
- ☐ Remind the new hire to complete 30-day and 3-month entrance surveys in Workday

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