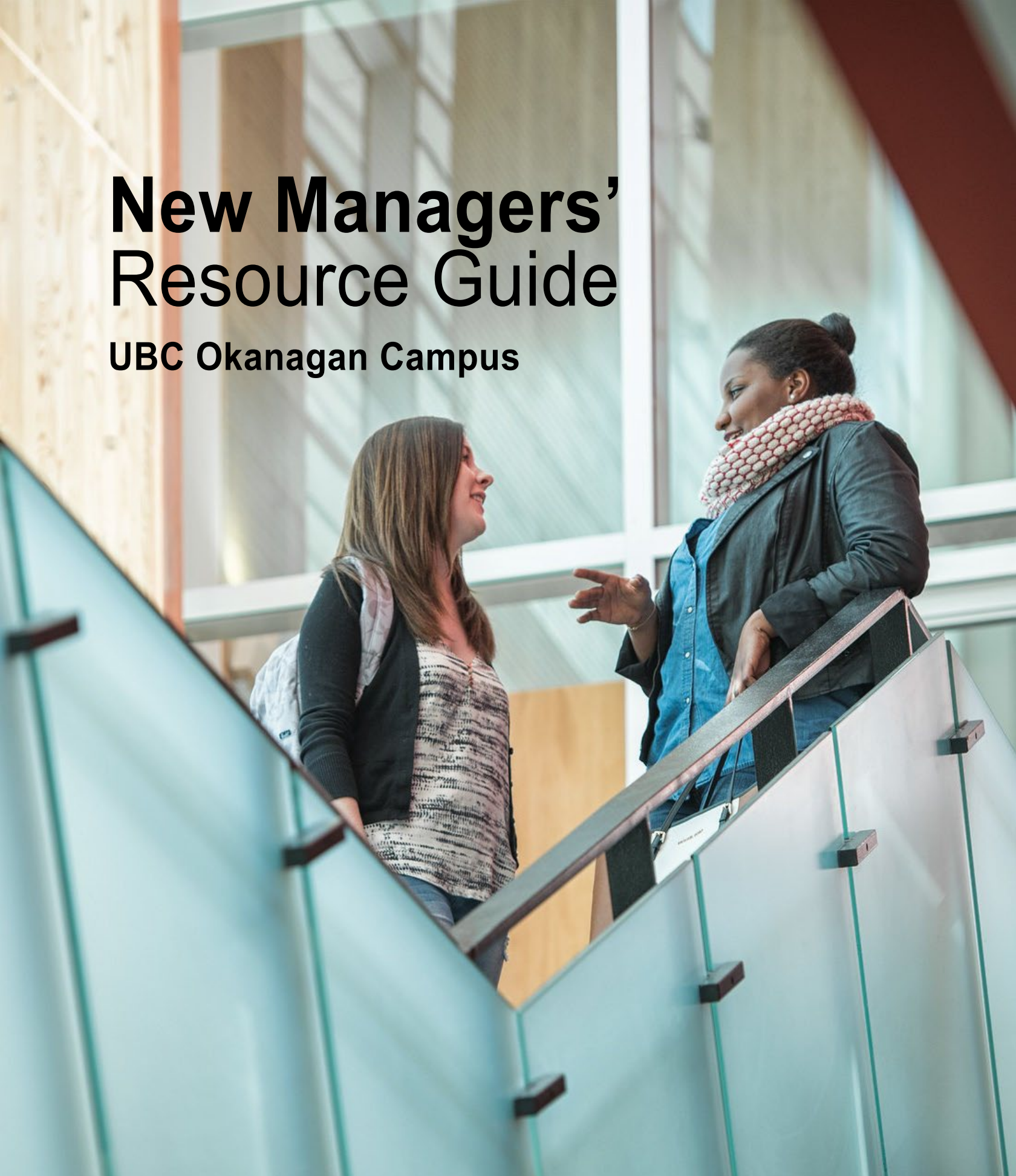


New Managers' Resource Guide

UBC Okanagan Campus





HOW TO USE THIS GUIDE

This resource is designed to be a repository of relevant processes, guidelines and support services for UBC Okanagan staff and faculty with people management responsibilities, such as supervisors, managers and leaders.

While this resource is campus-wide, each Faculty or Administrative Unit may have its own processes and practices. Your local HR representative is a good starting point for learning about unit-specific supports for managers.

As a new manager, you are *not* expected to do an in-depth review of all resources within this guide within your first weeks, as not all topics will be relevant to you right away. Rather, it will be helpful for you to have a general awareness of the resources at UBC, how to access them, and where to get support when a matter becomes relevant to you and your team.

For questions or to provide feedback about this resource, please email the UBCO HR Team at ubco.hr@ubc.ca.

Note: Certain links within this guide may require Campus-Wide Login (CWL) access for information in the Managers & Admin section of the HR website.

If redirected to a different landing page after logging in, simply click the original hyperlink within this guide again for direct access to the desired webpage.

If redirected to a *CWL Authentication Stale Request* page, try one of these options:

- a) Clear your browser history and cookies and reopen your browser
- b) Copy the link (right click + copy hyperlink) and paste it directly into the search bar
- c) Open the hyperlink in a new incognito tab in your browser



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



Recruitment & Hiring

When you are looking into hiring a new employee, your Human Resources team is a useful resource to include early in the process. Their expertise can help you to review your organizational structure and support you through each step in bringing on a new member into your team.

UBC is committed to inclusive recruitment for faculty, staff, and student employees, and increasing diversity in the workforce. Learn how to recruit excellent faculty and staff through a fair and equitable process by taking the online [Hiring Equity course](#). Stay updated on [resources for inclusive recruiting](#).

Staff Recruitment

- **Steps in staff recruitment**, including key considerations for creating a position and making an offer of employment, and candidate priority and recall guidelines

Faculty Recruitment

- **Steps in faculty recruitment**, key considerations, selection process guidelines, appointment checklists, Faculty and postdoctoral offer letter, and recruiting foreign academics, and more
- [Guide to Equitable Hiring Practices: Faculty Recruitment](#) – This guide equips Deans, Heads of Units, Directors, Chairs, members of hiring committees, and HR professionals with tools and resources to embed equity principles across hiring stages, from recruitment to onboarding.

Hiring a Student Employee

- **Student eligibility requirements**, co-op students, undergraduate and graduate students
- **Student hiring process**, creating and advertising for a student position, hours of work, salary considerations, unionized student positions, foreign student workers

Foreign Workers and Work Permits

- **Hiring foreign workers and academics**, eligibility and work permit requirements
- **International student employees**, eligibility and study permit requirements
- [Postdoctoral Fellowships](#), recruiting, immigration and appointment processes, offer letters



Key Contacts for Recruitment & Hiring

1. [Integrated Service Centre \(ISC\)](#) – For support or troubleshooting with Workday system processes, access the Workday Knowledge Base for how-to guides and FAQs, or request dedicated support from a Workday specialist.
2. [HR Advisory Services](#) – For more information or support with faculty/staff recruitment processes, review this contact page for dedicated HR advisors for your department.
3. [Postdoctoral Fellows Office](#) – For more information or resources about recruiting and onboarding Postdoctoral Fellows, contact our office for assistance.
4. [Work Study Program](#) – The Work Study (Okanagan) program supports and subsidizes meaningful work experiences on campus for current UBC students. Learn more about hiring and managing a Work Learn student on our website.



HR Policies & Collective Agreements

UBC HR provides an overview of policies and resources for administrators and managers for a range of issues, including layoffs, time off for volunteering, substance abuse, employee illness and attendance, and staffing during extreme weather and seasonal holidays.

Collective Agreements and Terms & Conditions of Employment

- UBC is organized into a number of employee groups with terms and conditions of employment specific to each group. Review the collective agreements, and Terms & Conditions of Employment for employees not represented by a bargaining agent, on the HR website.
- [Vacation and leaves](#) – Overview of all types of leaves, specific to each employee group

Hybrid Work at UBC

- **Hybrid work guidelines and FAQs** – Objectives, principles, guidelines and considerations
- **Hybrid work for leaders** – Resources for leaders considering hybrid work arrangements for their team, along with information about [hybrid work arrangements for staff](#)

Staffing and Operations

- Policies and resources for administrators and managers for a range of issues, including:
 - **Typical hours of work** for staff in different employee groups
 - **Terminations, layoffs, retirement and resignations** – Layoff and recall procedures, notice periods, offboarding reminders, [retirement options and resignation notices](#)
 - **Staffing during extreme weather and seasonal holidays**
 - **Providing support for employees** coping with domestic or sexual violence, and support for transgender, Two-Spirit, and non-binary employees at UBC
- Note: It is also a good idea to familiarize yourself with UBC's policies that may apply to your role. Please review applicable [university policies, procedures and guidelines](#).



Key Contacts for HR Policies & Collective Agreements

1. [HR Advisory Services](#) – For questions about HR policies for faculty/staff employee relations cases, review the contact page for dedicated HR advisors for your department.
2. [Benefits Team](#) – For questions about benefits coverage while on a leave or benefits coverage and life insurance conversion when leaving UBC.
3. [Staff Pension Office](#) or [Faculty Pension Office](#) – For questions about pension plan details during major life events, when changing jobs, resigning or retiring from UBC.
4. [Integrated Service Centre \(ISC\)](#) – For support or troubleshooting with Workday system processes, access the Workday Knowledge Base for how-to guides and FAQs, or request dedicated support from a Workday specialist.



Payroll, Time and Attendance & Business Expenses

UBC Finance oversees Payroll and also supports staff, faculty, researchers and administrators through the entire procurement and supply management cycle — from buying and payment to asset disposal.

Many payroll and financial processes are facilitated by Workday. It is recommended for managers and budget owners to take relevant [Workday training courses](#) on how to complete tasks and processes in Workday, including tracking time and attendance, procurement, and expense reporting.

Payroll, Time and Attendance

- [Payroll deadlines and calendar](#), information about pay, [tips for preventing pay errors](#)
- [Workday training](#) – Essentials for managers and staff in tracking time and attendance
- [Attendance management best practices](#), guidelines for managing employee attendance

Procurement

- [Purchasing](#) – Policies and processes, [sustainable purchasing guide](#), approved suppliers, Purchase Order guidelines, [Indigenous business directory](#), [ergo purchasing guides](#)
- [Payment](#) – Payment standards, invoicing standards, policies for use of UBC Visa Card

Business Expense Rules

- **Travel expenditures**, approval process, travel tips, expense guidelines for business travel
- **Hospitality and entertainment expense guidelines** for UBC events and meetings
- **Donations and gifts**, guidelines for donations and gifts, [Indigenous Finance Guidelines](#)
- **Computers and mobile devices**, eligibility rules, guidelines for purchase and disposal

Key Contacts for Payroll, Time and Attendance & Business Expenses

1. [Integrated Service Centre \(ISC\)](#) – For support or troubleshooting for Workday system processes, access the Workday Knowledge Base for how-to guides and FAQs, or request dedicated support from a Workday specialist.
2. [UBCO Payroll](#) – For urgent payroll issues, such as preventing incorrect or delayed pay, contact Payroll via email. For general payroll support, submit a ticket through the ISC.
3. [UBCO Finance Operations](#) – For questions or assistance with budgeting, research finance, or other procurement related matters for your department.



Performance Management, Job Evaluation & Compensation

Employees and managers each play an active role to ensure performance conversations happen and are successful. Typically, managers will schedule performance conversations as a series of regular check-ins – we recommend a minimum of one per month – that culminate in a final year-end review.

Due to the diversity and number of jobs at UBC, compensation relies on expertise and tools to ensure equitable and competitive pay for jobs across the university. It is important for managers to understand the job evaluation and salary administration processes, and resources available to support.

Performance Conversations

- **UBC performance conversation cycle and process**, principles and approach at UBC, guidelines and considerations for performance reviews, recommended review schedule by employee group, performance development tools, and disciplinary process at UBC

Staff Compensation & Job Evaluation

- [Staff job families](#) – View standard job descriptions, benchmarks and occupational guidelines for classifying positions designated by each employee group
- [Staff job evaluation](#) – Job evaluation process for new jobs
- [Staff position reclassification](#) – Reclassification process for significant changes to positions, request forms and guidelines for employees and their managers
- [Staff salary scales](#) – View staff salary scales based on employee group
- [Staff salary administration](#) – Guidelines and processes for setting starting salaries, and other salary administration programs

Faculty Compensation & Appointment

- [Faculty titles, ranks and descriptions](#) – View the faculty appointment matrix, view positions within and outside of the Faculty Bargaining Unit and related appointments
- [Appointment, reappointment, tenure and promotion](#) – Guidelines and procedures for faculty appointments, tenure and confirmation processes, and appointment schedules
- [Starting salaries](#) – Minimum salaries for benefits eligibility, guidelines for faculty groups
- [Faculty salary increases](#) – Tools for administrators to manage faculty career progress increments, merit increases, performance salary adjustments, retention funds, etc.
- [Faculty honoraria and administrative stipends](#) – Guidelines and approval processes for administering honoraria and stipends, benefits and tax implications, payments info



Key Contacts for Performance Management, Job Evaluation & Compensation

1. [HR Advisory Services](#) – For further assistance with the faculty and staff appointments, performance review and promotion/tenure processes, review the contact page for dedicated HR advisors for your department.
2. [Compensation](#) – For questions about staff compensation administration or job evaluation processes, review the contact page for dedicated compensation consultants for your department.



Workplace Safety, Wellbeing & Benefits

UBC offers resources to foster your wellbeing as an individual, opportunities to champion healthy workplace initiatives, and services to support a healthy work environment.

All managers and supervisors are invited to complete this required mental health training through Workplace Learning: [Supporting Mental Health in the Workplace for Managers and Supervisors](#). This training will help you understand how you can build a supportive workplace culture, address challenging times, and ensure you are aware of your responsibilities to your team and direct reports.

Health, Safety and Environment

- **Safety programs**, emergency preparedness, security, [UBC CAIRS](#)
- **Health and environmental programs**, policies and guidelines, incident reporting procedures

Mental Health in the Workplace

- **Supporting mental health in the workplace**, learning opportunities, programs, initiatives, and funding opportunities, consulting services, recommended actions and strategies for leaders
- **Mental health support and resources**, Employee and Family Assistance Program, extended health benefits, Not Myself Today Ambassador program
- **Helping employees in distress**, access the [Orange Folder](#) (for faculty and staff emergency resources) or [Green Folder](#) (for student emergency resources)

Benefit Plans & Programs

- **Eligibility and enrolment**, eligibility criteria and enrolment processes
- **Detailed information on the benefits available for each plan** including extended health, dental, disability insurance, employee and family assistance, family building benefits, health spending accounts, life insurance, personal spending accounts and tuition waiver program.

Ergonomics Program

- [Ergo design guidelines](#) for office renovations and new builds and [ergo furniture and equipment purchasing guides](#). [Ergo funding](#) may be available for innovative solutions for high-risk manual jobs (*this fund is not designed to cover office furniture or equipment*).
- **Ergonomics consultation**, requesting an ergonomics assessment
- **Ergonomics training and education**, ergo workshops and online guides for different work environments, WorkSafeBC requirements, how to identify, assess, and implement control measures for musculoskeletal injury (MSI) risk factors in the workplace



Workplace Accessibility and Accommodations

- **Work Reintegration and Accommodation Program (WRAP)**, what to expect in the process in facilitating a safe return to work from injury or illness for your employees
- **Centre for Workplace Accessibility**, information about disability and workplace accessibility, accessibility consultations, workshops and initiatives, [Workplace Accommodation Fund](#)
- [WorkSafeBC claims process for managers](#), responsibilities, working out-of-province

Key Contacts for Workplace Safety, Wellbeing & Benefits

1. [Health, Safety and Environment](#) – For emergency numbers, health and safety committee details, and key contacts for campus safety programs
2. [Workplace Health & Wellbeing](#) – For workplace wellbeing programs, training and support, or for the Work Reintegration and Accommodation Program (WRAP)
3. [Ergonomics Program](#) – For ergonomics assessments, consultation and support
4. [Centre for Workplace Accessibility](#) – For disability-related accessibility support
5. [Benefits Team](#) – For questions or information about benefits eligibility and coverage



Talent Development & Team Engagement

Creating opportunities for career growth and ongoing learning are important for faculty and staff engagement and retention. Explore a range of opportunities for your team's development. UBC is also committed to the ongoing development of leaders, like yourself, at every level of the organization.

As a leader, coaching team members and building team engagement is essential for your team's success. In addition to leadership development programs, learn how you can [develop coach-approach skills](#) or formalize your coaching competencies by investing in an accredited coach training program.

Leadership Development

- [UBC Leadership Framework](#) highlights UBC's leadership philosophy, defined leadership competencies and behaviours, and resources and strategies for getting started
- [Developing Leaders Program](#) is a cohort-based program that supports new and early-career managers with building their capacity to lead with more confidence and effectiveness. The program is open to Management & Professional staff who have staff reporting directly to them.
- [Academic Leadership Development Program](#) is a cohort-based program that supports new academic leaders (Department Heads, Associate Deans and Directors) in their first year of their roles across three pillars: developing relational leadership capacity, gaining fluency with the university's strategic priorities, and technical management skills.

Professional Development

- [Approving professional development fund claims](#) – As a manager or supervisor, you are accountable for reviewing the relevance of your faculty or staff's PD Fund claim as it relates to their role and career growth. Learn more about [PD Funds for faculty and staff](#).
- [Organizational change management](#) – Access tools and resources for managing, supporting, planning and implementing organizational change at UBC, as well as change management self-directed online learning and community of practice.
- [Coaching Services](#) – Coaching services for leaders, faculty and staff to engage and build their career at UBC and that of their teams, coaching education and coaching internship program.



Team Building Opportunities

- [Visit UBCO](#) – Learn about the things to see and do on campus for your next team activity, including visiting one of the campus attractions or food outlets
- [UBCO Events](#) – Learn about the things to see and do on campus for your next team activity, including performances, talks, workshops, info sessions, and more
- [UBCO Campus Trails](#) – Enjoy the natural environment around campus to learn about nature, practice mindfulness and stay well, or have walking meetings
- [Workplace wellbeing programs](#) – Mental health, physical wellbeing, education and consulting services that support wellbeing activities within UBC units and promote wellbeing at work
- [UBCO Recreation](#) – On-campus programs, yoga, fitness, walking programs, and team-based recreation events for faculty and staff (e.g. Faculty & Staff Sports Day, Intramural events)

Key Contacts for Talent Development & Team Engagement

1. [Workplace Learning & Engagement](#) – For more information or questions about workplace learning or engagement programs for Okanagan campus
2. [Organizational Change & Transition](#) – For more information, questions or additional support about organizational change management practices at UBC
3. [Integrated Service Centre \(ISC\)](#) – For questions about PD Fund claims in Workday
4. **Staff PD Funds** (pd.funds@ubc.ca) or **Faculty PD Funds** (faculty.pd@ubc.ca) – For questions about guidelines for approving PD Funds



Conflict Management & Respectful Environment

The University of British Columbia strives to establish employment and educational practices that respect the dignity of individuals and make it possible for everyone to live, work and study in a positive and supportive environment, free from harmful behaviours such as bullying and harassment.

As a manager, it is important in your role to ensure the workplace is respectful and free from harassment. If there are concerns brought forward from your team members or colleagues, you have an obligation to address these and provide appropriate support and guidance based on the circumstances. Please contact your HR representative to provide you with additional guidance.

Faculty or staff who have concerns about personal harassment should contact their direct supervisor or Administrative Head of Unit. Where the issue is not resolved or there is concern about conflict of interest, faculty and staff should contact their employee association, union, or Human Resources.

Respectful Environment & Conflict Resolution

- [Respectful Environment](#) – Respectful Environment Statement, steps to resolve conflict, FAQs about respectful environment and conflict resolution, UBC Retaliation Policy, helpful resources
- [Human rights disclosures & complaints](#) – Steps and guidelines for handling disclosures and complaints, recommended next steps and support resources following conversation
- [Respectful dialogues guide](#) – Preparing, engaging and following up on difficult conversations
- [Building a respectful online work environment](#) – Standards for online conduct, hosting respectful online meetings, recommended steps and resources for handling conflict



Key Contacts for Conflict Management & Respectful Environment

1. [HR Advisory Services](#) – To escalate an unresolved issue (faculty/staff) or require further assistance, review the contact page for dedicated HR advisors.
2. [Ombudsperson for Students](#) – To escalate an unresolved issue (student) or require further assistance related to Respectful Environment, contact the Ombudsperson.
3. [Human Rights Advising Office](#) – For information, advice or assistance with resolving concerns related to human-rights related discrimination
4. [Sexual Violence Prevention and Response Office](#) – For information and supports for those who have experienced or been impacted by sexual or gender-based violence, harassment, or harm, and resources and guides for supportive actions for those supporting someone
5. [UBC Investigations Office](#) – Responds to formal reports filed under UBC's [Sexual Misconduct Policy \(SC17\)](#), [Discrimination Policy \(SC7\)](#) and [Retaliation Policy \(SC18\)](#)



Housing, Immigration & Relocation

UBC can help your new hire throughout the relocation process, offering valuable support and resources encompassing housing and family care options, as well as immigration matters.

Housing & Childcare Resources

- **Market rental housing options for UBCO faculty and staff**
- **Childcare and schooling options, [UBCO childcare services](#), other childcare services**
- **Community resources**

Immigration & Relocation

- **Requirements and work permits**, temporary residency, work permit renewals, permanent residency, immigration steps for foreign nationals
- **Relocation policies, contacts and forms**, relocation process, relocation assistance
- **[Relocating to Kelowna](#)** (UBC Okanagan)

Key Contacts for Housing, Immigration & Relocation

1. **[UBCO Housing, Immigration and Relocation Services](#)** – For consultation or information about UBCO immigration and relocation
2. **[UBC Central Relocation Fund](#)** supports eligible faculty and senior management moving to Metro Vancouver or Kelowna to work at UBC. For inquiries about relocation policy and reimbursement process, contact our **[Relocation & Benefits Analyst](#)**.
3. **[UBCO Childcare Services](#)** prioritizes spaces for the children of students, faculty and staff at UBCO. The waiting list tends to be long; inquire early about available space.