

Successfully Onboarding Your Staff in the Virtual World



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Overview

Learning Objectives:

- Analyze gaps and identify challenges in current onboarding structure
- Create a successful virtual onboarding framework
- Utilize available resources and develop new ones

Poll 1

What are you most looking to gain from this webinar? (select one)

- Evidence of successful onboarding to use for advocating for stakeholder buy-in to allow remote hires
- Improve current virtual onboarding processes in your office that already allows remote work
- Draft an onboarding process for your office that already allows remote work

Virtual Onboarding

- Preparation
- Pre-boarding
- Onboarding
- Production





Video 1

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Donlan, D. *Workplace Orientation is Not Training* [Video]. TEDxBryantU

<https://youtu.be/5A1dW9hwI0M>



Poll 2

Since March 2020, have you hired an employee to work 100% virtually and/or were you hired to work 100% remotely?

- I hired someone
- I was hired
- Neither



Preparation

Analyze gaps &
Identify challenges in
current onboarding
structure



Preparation

- Update or develop a structure for onboarding new hires
- Understand institutional policies and procedures regarding telework or remote work





Poll 3

Does your office have a new hire handbook/onboarding guide?

- Yes
- No



Preparation - New Hire Guide

Onboarding 2022_August FRAs .XLSX ☆ 📄 🌐

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	A	B	C	D	E
1					
2		About On-boarding Essentials	Applicable Links	Complete?	
3		As with any new job, there are loads of documents to review and sign. Some you'll need to complete right away, whereas others you can work through within your first few weeks on the job. Work with the OSP Fiscal & Program Manager (Dwayne Watson) to ensure you've completed the required documents and training. You can check them off below as you go!			
4		You can find a lot of employment information on the CSU New Employee website	https://hr.colostate.edu/new-employees/		
5		HR and University Documents			
6		Anti-harrasment Training - This information will be sent to your Outlook e-mail			
7		Hiring documents such as the SSA-1945, I-9, and payroll documents (e.g. direct deposit, W-4 Federal and State) will be completed online with your new employee welcome packet that will be emailed to you. Remember to have your driver's license, proof of SS#, and bank information available.			
8		Benefit elections (e.g., health insurance, retirement, and voluntary contributions). You should receive info via e-mail.			
9		Access HR (AAR) portal and TimeClock plus for logging vacation & sick leave- Review with the Fiscal & Program Manager - via MyRAM or AAR	https://aar.is.colostate.edu/		
10		If you have a supervisory role, you'll need to learn how to approve employee time sheets in TimeClock Manager. The Fiscal & Program Manager can walk you through this process.	https://aar.is.colostate.edu/		
11		Vaccine Reporter - Complete this mandatory reporting for COVID-19 vaccination or waiver. Check on CSU's mask policy prior to coming to campus.	https://covid.colostate.edu/		
12		University Telework policy - Please complete if you will be teleworking any day of the week. You will need to update this annually.	http://policylibrary.colostate.edu/policy.aspx?id=776		
13		OSP Telework addendum - Complete via OSP intranet accessed via MyRAM	https://aar.is.colostate.edu/research.html		
14		Complete (or update) your annual Conflict of Interest (COI) disclosure	https://www.research.colostate.edu/ricro/coi/		
15		University Holidays - You may want to add dates to your Outlook calendar	https://hr.colostate.edu/current-employees/benefits/afap/leave/other-leaves/		
16		University Orientation - It is up to an individual as to whether they want to participate in the University Orientation	https://training.colostate.edu/ue/		

+ ☰ About this Template ▾ On-boarding Essentials ▾ E-mail & Building Access ▾ Meet OSP ▾ Roles & Responsibilities ▾ Systems ▾ SRA Tasks ▾ RA Tasks ▾

OSP Provides Pre-Award, Award, and some Post-Award assistance to departments, units, and colleges on campus by Research Administration Teams which consist of a Research Administrator (RA) and a Senior Research Administrator (SRA). Below is a breakdown of each of the Teams and their portfolios. Also included on this tab is a link to department and unit contacts and the roles and responsibility matrix for each step in the award life cycle.

<https://www.research.colostate.edu/osp/staff/#>

Team 1 - 13XX Walter J. Scott Jr., College of Engineering (WSCE) most departments - see OSP staff page for full portfolio listing

sponsoredprogramsteam1@research.colostate.edu

Team 2 - 16XX Veterinary Medicine and Biomedical Sciences (CVMBS) most departments - see OSP staff page for full portfolio listing

sponsoredprogramsteam2@research.colostate.edu

Team 3 - 18XX College of Natural Science (CNS) most departments - and various single unit/departments - see OSP staff page for full portfolio listing

sponsoredprogramsteam3@research.colostate.edu

Team 4 - 14XX Warner College of Natural Resources (WCNR) most departments - and various single unit/departments - see OSP staff page for full portfolio listing

sponsoredprogramsteam4@research.colostate.edu

Team 5 - 11XX Agricultural Sciences - all departments; 3000 Agricultural Experiment Station - most units; 1700 Liberal Arts - all departments; and various single unit/departments - see OSP staff page for full portfolio listing

sponsoredprogramsteam5@research.colostate.edu

Team 6 - 15XX Health and Human Sciences (HHS) all departments; 12XX College of Business - all departments; and various single unit/departments - see OSP staff page for full portfolio listing

sponsoredprogramsteam6@research.colostate.edu

Unit Contact information

College Stakeholders

<https://www.research.colostate.edu/osp/stakeholder-contacts/>

Department Contact List

<https://www.research.colostate.edu/osp/department-college-contact-information/>

Roles and Responsibility Matrices

Budget and Budget Development

<https://www.research.colostate.edu/osp/proposal-budget-development/roles-responsibilities-matrix/>

Proposal Review and Submission

<https://www.research.colostate.edu/osp/proposal-review-submission/roles-responsibilities-matrix/>

Award Receipt and Negotiation

<https://www.research.colostate.edu/osp/award-receipt-negotiation/roles-responsibilities-matrix/>

This tab contains written, on-demand resources about the structure of sponsored programs administration at CSU, as well as links to CSU policies for research and Financial Procedure Instructions (FPI). It also contains links to on-line learning modules over the basics of sponsored programs administration in the CSU staff learning management system (My Learning) and professional development opportunities available through CSU's Talent Development.

General Guidance

Uniform Guidance

<https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200?toc=1>

Federal Acquisition Regulations

<https://www.acquisition.gov/browse/index/far>

CSU Research Administration Overview and Policies

CSU Policy Library

<http://policylibrary.colostate.edu/>

Research Administration at CSU - website resource

<https://www.research.colostate.edu/osp/2019/08/22/research-administration-at-csu/>

Research Administration at CSU - online course

<https://csutraining.bridgeapp.com/learner/library>

Federal Award Mechanisms - website resource

<https://www.research.colostate.edu/osp/2019/09/04/federal-award-mechanisms/>

CSU Fund Groups - website resource

<https://www.research.colostate.edu/osp/2019/08/29/cs-u-fund-groups-related-to-sponsored-projects/>

Research Administration Guidance on OSP website

<https://www.research.colostate.edu/osp/guidance/>



Tasks ▾

Contracting Officer Tasks ▾

Fin Compliance Mgr Tasks ▾

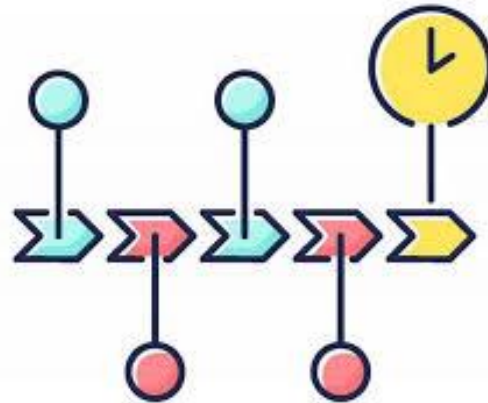
Award Set-up Coordinator ▾

Glossary & Acronyms ▾

On-demand Resources

Preparation

Develop a timeline for onboarding based on the new hire guide



Preparation

Onboarding Timeline Overview

Preboarding

- Start Early
- Equipment
- Human Resources
- POCs
- Schedule
- Expectations

First day/First Week

- Welcome
- Strategic Introductions
- Access to systems
- Culture
- Schedule
- Buddy
- Mentor

Month 1 Check-in

- Schedule
 - Training check-in
- Buddy
- Mentor
- Systems access
- Follow-up on Intros
- Needs?

Month 3 Check-in

- Milestones met?
- Continuous training
- Schedule update
- Evaluate training
- Needs?
- Buddy
- Mentor

Onboarding Timeline Sample

Onboarding Schedule

Prior to First Day

- Welcome email with onboarding document

Week One

- Day One
 - o Welcome video
 - o Laptop and Systems set-up
 - o Lunch or coffee break
 - o Meet with Team(s)
- Day Two – Five
 - o Opportunity to work with onboarding document and online learning

Week Two

- Around the Horn – Best Practices and resources on CSU and OSP Website. Introduction to OSP Intranet – Training Team, all new staff
- Best Practices in Outlook and Teams (if needed) – Training Team, all new staff
- FileHold Demo – Andy Reynolds, all new staff
- Negotiations – Andy Reynolds, new SRA, RA,
- System and Portal Discussion – Chris Carsten, all new staff
 - o [MyRAM](#)
 - o OSP Intranet – within [MyRAM](#)
 - o [Portal guidance](#)
 - o [Kuali Research training modules](#)

Week Three

- Research Administration at CSU & Pre-award Responsibilities – prework, new SRA, RA, FRA
 - o [Module Research Administration at CSU](#)
 - Which office or unit is primarily responsible for research development activities and oversees the limited submission program?

Poll 4

Does your office have an established Onboarding process?

- Yes
- No



Video 2

Capital Associated Industries. *Two Onboarding Experiences - Which First Day on the Job Sounds Like Your Workplace?* [Video]. YouTube.

https://youtu.be/OxWj7Z_2jOY

Poll 5

Who do you relate to in the video?

- Jane Regret
- Tom Happy



Pre-boarding

- Job offer accepted – now what?
 - Start Early
 - Equipment and software
 - Human resources
 - Identify systems and prepare permissions



Pre-boarding

Communication with new hire – what to include?

- Points-of-contact
- Schedule
- Expectations
 - Office
 - Institution

Pre-boarding - Sample letter

Subject CSU Onboarding Resource

<Attach onboarding document>

Hello _____,

Welcome to the CSU Office of Sponsored Programs (OSP)! Attached is an onboarding document for your use. We will add this document to FileHold, but we wanted you to have a local copy until you have FileHold access.

The document has tabs that include resources, an overview of SRA and RA responsibilities, common acronyms we use (like SRA and RA), systems for sponsored programs and more. It's a lot to take in, so please pace yourself.

I, along with the others copied on this email, will be in touch with you over the next several weeks regarding onboarding. Included on this email:

- **Dwayne Watson** – Primary OSP contact for HR-related matters and the glue that holds us together
- **INSERT TEAMMATE** – Your onboarding buddy and fellow **ROLE** who will walk you through OSP processes and functions related to your position
- **INSERT TEAMMATE** – Team ___ who will work with you collaboratively to support your constituents.
- **Chris Carsten and Andy Reynolds** – OSP systems people who will help provide you with access to systems (along with Dwayne) for sponsored programs administration and who will provide some basic system training and point you to resources
- **Ashley Stahle** – Associate OSP Director and Interim Director
- **Kim-Melville Smith** – Assistant Director & Director of Post-Award
- **Kathryn O'Hayre and Shannon Irely** – OSP trainers who will provide high-level overview training on sponsor and CSU guidance, roles and responsibilities, etc.

Please reach out if you have any questions! See you next week.

OSP Training Team



COLORADO STATE UNIVERSITY



OSP addendum to University Telework MOU



OFFICE OF SPONSORED PROGRAMS COLORADO STATE UNIVERSITY

Pursuant to this section in the University's **Teleworking Application and Memorandum of Understanding** (August 2021):

Department Expectations - Teleworker is familiar with any departmental expectations for telework.
Internet - Teleworker has confirmed that their off-site location's internet service meets or exceeds 60 Mbps for them to fulfill their responsibilities.

OSP has developed the attached Telework Tech Specs, designed to help teleworkers set up and enable/configure their personal devices for connection to CSU resources and to communicate with the campus community.

I have read and understand the OSP telework technical information.

I confirm that my off-site location's internet service meets or exceeds 60 Mbps.

OSP Teleworking – Technical specs & support

Contacts: Chris Carsten, Andy Reynolds, Jon Peterson

Best practices recommendations:

- Use Remote Desktop Connection for access to OSP resources (H: drive, applications (esp. FileHold))
- Use home (personal) computer or smartphone for Teams meetings and calls & Zoom meetings

Security warning:

DO NOT map network drives from the home personal computer – high security risk

Network, Secure Connection, Hardware

High-speed Internet

- Home network setup & connection is the responsibility of the individual – no CSU setup/support
 - Check internet speed:
 - Fast.com or speedtest.net sites will show download/upload bandwidth
 - Click 'show more info' at Fast.com to see all test details
 - Latency = response time -- at least 60 Mbps download speed required if using Pulse Secure
 - Major cable providers – 100 Mbps+ download speed
 - CenturyLink DSL – 20 Mbps+ download speed (not optimal)
 - CenturyLink Fiber – 100 Mbps+ download (comparable to cable)
 - Satellite – not recommended because of low speeds and latency issues
 - Municipal broadband -- 100 Mbps+ and synchronous upload/download speeds
 - May 2021 known projects, various phases of rollout: Connexion (Fort Collins), Pulse (Loveland), Longmont (NextLight); Trailblazer (Estes Park)
 - Video uses more upload bandwidth than audio only
 - Multiple devices using Wi-Fi can compromise work computer connection

Secure VPN connection = Pulse Secure + DUO 2-factor authentication

Poll 6

Does your institution provide a WiFi monthly stipend?

- Yes
- No



Onboarding- Virtual Welcome

1 Welcome to the Office of Sponsored Programs

2 Today's Agenda

- What is Research Administration
- Research Administration at CSU
- Overview of Sponsored Programs
- College and Department Resources
- Award Lifecycle
- P.S. DYK

3 What is.... Research Administration?

4 CSU Research Administrators

5 Who We Are...

6 Office of Sponsored Programs (OSP)

7

8 Office of Vice President for Research (OVPR)

9 CSU Colleges

Onboarding - Strategic Introductions



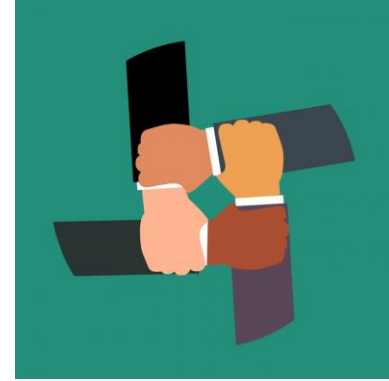
6 Teams

Team Name	Director	Staff
Team 1: Research Administration	Jan Campbell	Jan Campbell, Kim Taylor, Jan Campbell, Kim Taylor, Jan Campbell, Kim Taylor
Team 2: Research Support	Kim Taylor	Kim Taylor, Jan Campbell, Kim Taylor, Jan Campbell, Kim Taylor, Jan Campbell
Team 3: Research Administration	Jan Campbell	Jan Campbell, Kim Taylor, Jan Campbell, Kim Taylor, Jan Campbell, Kim Taylor
Team 4: Research Support	Kim Taylor	Kim Taylor, Jan Campbell, Kim Taylor, Jan Campbell, Kim Taylor, Jan Campbell
Team 5: Research Administration	Jan Campbell	Jan Campbell, Kim Taylor, Jan Campbell, Kim Taylor, Jan Campbell, Kim Taylor
Team 6: Research Support	Kim Taylor	Kim Taylor, Jan Campbell, Kim Taylor, Jan Campbell, Kim Taylor, Jan Campbell



Onboarding - Culture

- Diversity, Equity, Inclusion, *and* Accessibility
- Values
 - Relationships
 - Integrity
 - Growth
 - Accountability
 - Trust
- Work/Life Balance



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Onboarding



- Schedule
 - Mix independent learning with team interaction
 - Do not try to get to everything in the first week
 - Schedule regular check-ins with manager

Onboarding



<https://podcasts.apple.com/us/podcast/taken-for-granted-satya-nadella-is-building-the-future/id1346314086?i=1000563435670>

Onboarding - Buddy vs Mentor

Onboarding Buddy

- friendly face & peer
- similar role
- provides shadowing experience
- provides advice and support (short- or long-term)

Mentor

- formal, structured
- higher level or previous experience
- long-term process
- discussions are confidential
- work together to ensure success and development of mentee

Production



- Post-orientation/onboarding
- Priorities and Goals
- Performance review
 - Milestones achieved?
- Contributions to bigger picture

Additional Resources

- Donlan, D. *Workplace Orientation is Not Training* [Video]. TEDxBryantU <https://youtu.be/5A1dW9hwl0M> (Video 1)
- Capital Associated Industries. *Two Onboarding Experiences - Which First Day on the Job Sounds Like Your Workplace?* [Video]. YouTube. https://youtu.be/OxWj7Z_2jOY (Video 2)
- Grant, A. (Host). (2022, May 23). *Satya Nadella is Building the Future*. [Audio podcast episode] In *WorkLife with Adam Grant. Re: Thinking*. TED. Apple. <https://podcasts.apple.com/us/podcast/taken-for-granted-satya-nadella-is-building-the-future/id1346314086?i=1000563435670> (The section that would be valuable to play is 8:58 - 11:23)
- “10 Remote Onboarding Best Practices and their Significant Benefits of your Remote Employee” - <https://biz30.timedoctor.com/remote-onboarding-best-practices/>

Additional Resources

- Collaborate NCURA (Professional Networking Platform) - Login → Sample Policies and Procedures:
 - Colorado State University Teleworking Agreement - <http://policylibrary.colostate.edu/policy.aspx?id=776>
 - University of South Carolina Telecommuting Agreement - <https://sc.edu/policies/ppm/hr122.pdf>
 - Boston University Remote Work Guidelines - <https://www.bu.edu/hr/lifebu/remote-work/remote-work-guidelines/>
- *Employers Risk Driving New Hires Away with Poor Onboarding* (2022 October 7) <https://www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/employers-new-hires-poor-onboarding.aspx>
- *Buddying vs. Mentoring* (2022 October 7). Skillsforcare. <https://www.skillsforcare.org.uk/resources/documents/Recruitment-support/Retaining-your-staff/Buddying-Vs-Mentoring.pdf>

Questions

Join us for the live Q&A

