Successfully Onboarding Your Staff in the Virtual World

Acting Assistant Vice President, Sponsored Program Administration
University of Maryland, Baltimore

Senior Grants & Contracts Specialist
The University of Texas at Austin

Associate Director, Interim Director, Sponsored Programs
Colorado State University
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

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

https://youtu.be/5A1dW9hwl0M
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

<table>
<thead>
<tr>
<th>About On-boarding Essentials</th>
<th>Applicable Links</th>
<th>Complete?</th>
</tr>
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<tbody>
<tr>
<td>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 &amp; Program Manager (Dwayne Watson) to ensure you've completed the required documents and training. You can check them off below as you go!</td>
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## You can find a lot of employment information on the CSU New Employee website

https://hr.colostate.edu/new-employee/

| HR and University Documents | |
|-----------------------------|------------------|-----------|
| Anti-harassment Training - This information will be sent to your Outlook e-mail |
| 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. |
| Benefit elections (e.g., health insurance, retirement, and voluntary contributions). You should receive info via e-mail. |
| Access HR (AAR) portal and TimeClock plus for logging vacation & sick leave - Review with the Fiscal & Program Manager - via MyRAM or AAR |
| 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. |
| Vaccine Reporting - Complete this mandatory reporting for COVID-19 vaccination or waiver. Check on CSU’s mask policy prior to coming to campus. |
| University Telework policy - Please complete if you will be teleworking any day of the week. You will need to update this annually. |
| OSP Telework addendum - Complete via OSP Intranet accessed via MyRAM |
| Complete (or update) your annual Conflict of Interest (COI) disclosure |
| University Holidays - You may want to add dates to your Outlook calendar |
| University Orientation - It is up to an individual as to whether they want to participate in the University Orientation |

[https://hr.colostate.edu/new-employee/](https://hr.colostate.edu/new-employee/)
[https://aar.js.colostate.edu/](https://aar.js.colostate.edu/)
[https://aar.js.colostate.edu/research.html](https://aar.js.colostate.edu/research.html)
[https://www.research.colostate.edu/ric/o/c/0r](https://www.research.colostate.edu/ric/o/c/0r)
[https://hr.colostate.edu/current-employees/benefits/approachother-travel/](https://hr.colostate.edu/current-employees/benefits/approachother-travel/)
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[https://hr.colostate.edu/current-employees/benefits/approachother-travel/](https://hr.colostate.edu/current-employees/benefits/approachother-travel/)
### About Roles & Responsibilities

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.

| Team 1 | 13XX Walter J. Scott Jr., College of Engineering (WSCE) most departments - see OSP staff page for full portfolio listing |
| Team 2 | 16XX Veterinary Medicine and Biomedical Sciences (CVMBS) most departments - see OSP staff page for full portfolio listing |
| Team 3 | 18XX College of Natural Science (CNS) most departments - and various single unit/departments - see OSP staff page for full portfolio listing |
| Team 4 | 14XX Warner College of Natural Resources (WCNR) most departments - and various single unit/departments - see OSP staff page for full portfolio listing |
| 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 |
| 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 |

### Unit Contact Information

- College Stakeholders: [https://www.research.colostate.edu/osp/stakeholder-contacts/](https://www.research.colostate.edu/osp/stakeholder-contacts/)
- Department Contact List: [https://www.research.colostate.edu/osp/department-college-contact-information/](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/](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/](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/](https://www.research.colostate.edu/osp/award-receipt-negotiation/roles-responsibilities-matrix/)

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**NCURA**

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<td>Federal Acquisition Regulations</td>
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<tr>
<td>CSU Research Administration Overview and Policies</td>
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<td>CSU Policy Library</td>
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<tr>
<td>Research Administration at CSU - website resource</td>
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<tr>
<td>Research Administration at CSU - online course</td>
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<tr>
<td>Research Administration Guidance on OSP website</td>
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Preparation

Develop a timeline for onboarding based on the new hire guide
# Preparation

## Onboarding Timeline Overview

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<tr>
<th>Preboarding</th>
<th>First day/First Week</th>
<th>Month 1 Check-in</th>
<th>Month 3 Check-in</th>
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</table>
| - Start Early  
- Equipment  
- Human Resources  
- POCs  
- Schedule  
- Expectations | - Welcome  
- Strategic Introductions  
- Access to systems  
- Culture  
- Schedule  
- Buddy  
- Mentor | - Schedule  
  - Training check-in  
- Buddy  
- Mentor  
- Systems access  
- Follow-up on Intros  
- Needs? | - 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**
  - Welcome video
  - Laptop and Systems set-up
  - Lunch or coffee break
  - Meet with Team(s)
- **Day Two – Five**
  - 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
  - **MyRAM**
  - **OSP Intranet – within MyRAM**
  - **Portal guidance**
  - **Kuali Research training modules**

Week Three
- Research Administration at CSU & Pre-award Responsibilities – prework, new SRA, RA, FRA
  - **Module Research Administration at CSU**
    - Which office or unit is primarily responsible for research development activities and oversees the limited submission program?
    - Which office or unit is primarily responsible for research administration activities at CSU?
Poll 4

Does your office have an established Onboarding process?

- Yes
- No
Video 2


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

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 Irey** – 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
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 work.

**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 self-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.

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**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
Onboarding - Strategic Introductions

Office of Vice President for Research (OVPR)

CSU Colleges

6 Teams

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Onboarding - Culture

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

## Onboarding - Buddy vs Mentor

<table>
<thead>
<tr>
<th>Onboarding Buddy</th>
<th>Mentor</th>
</tr>
</thead>
<tbody>
<tr>
<td>• friendly face &amp; peer</td>
<td>• formal, structured</td>
</tr>
<tr>
<td>• similar role</td>
<td>• higher level or previous experience</td>
</tr>
<tr>
<td>• provides shadowing experience</td>
<td>• long-term process</td>
</tr>
<tr>
<td>• provides advice and support (short- or long-term)</td>
<td>• discussions are confidential</td>
</tr>
<tr>
<td></td>
<td>• work together to ensure success and development of mentee</td>
</tr>
</tbody>
</table>
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/5A1dW9hwI0M (Video 1)
  https://youtu.be/OxWj7Z_2jOY (Video 2)
  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)
Additional Resources

● Collaborate NCURA (Professional Networking Platform) - Login → Sample Policies and Procedures:
  ○ 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)

Questions

Join us for the live Q&A