Onboarding Timeline and Toolkit for On-campus, Remote and Hybrid Employees

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2 Weeks before Start

Create a list of all stakeholders for meeting

Create a 2 week orientation calendar

Buddy calls the new employee

Plan first day of work

Announce new staff member to org

Make a personalized "Welcome" banner/sign and posting it in their workspace

Determine workspace location

Determine what computer/phone/access is needed

Order new keys/arranges access building

2 Weeks Before Start

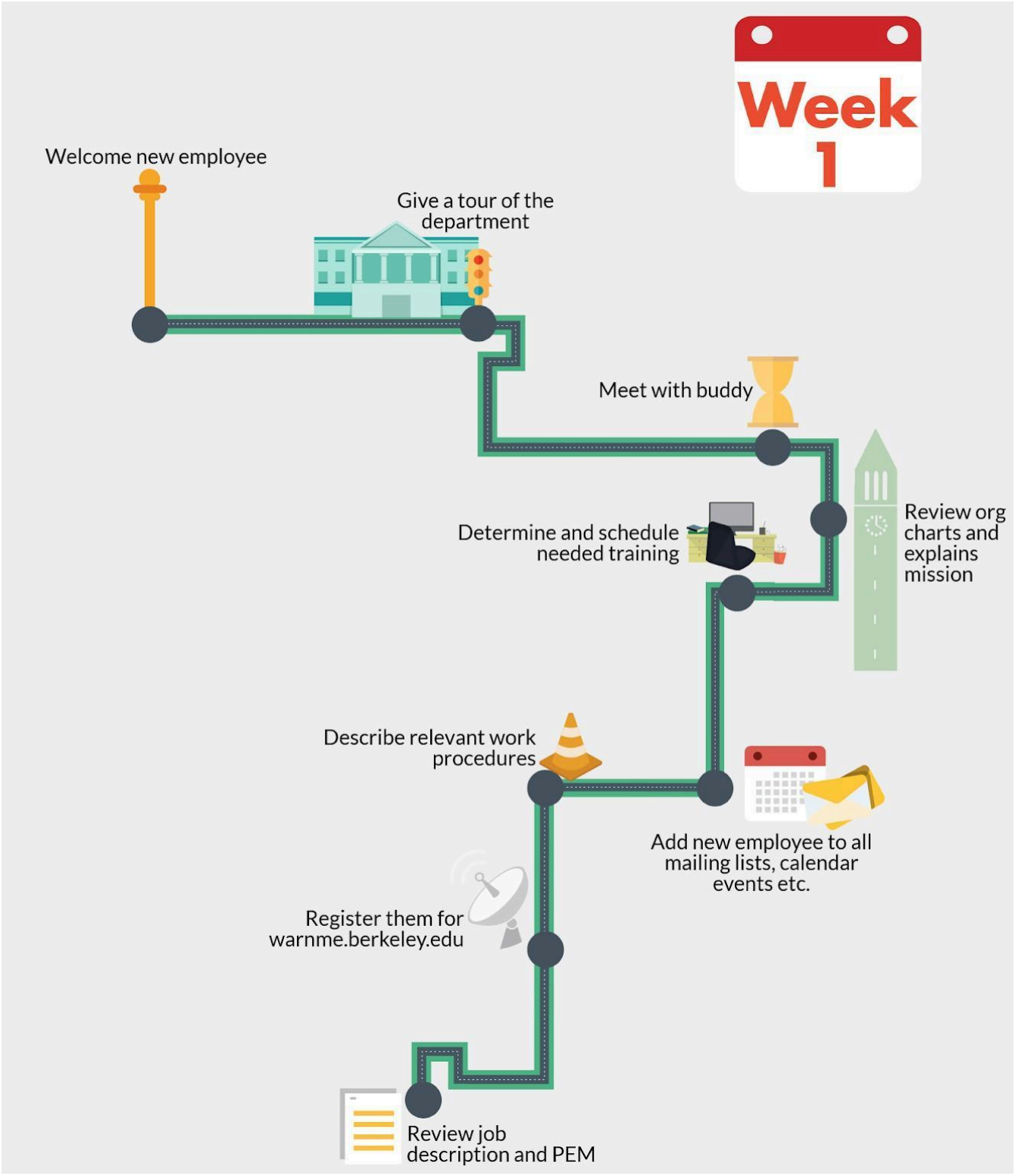
- Supervisor creates a list of all stakeholders the new employee needs to meet in the first two weeks and creates a 2 week orientation calendar:
  - For all new employees:
    - Creating a google calendar for the new hire (this can be done even if the new hire does not yet have a berkeley.edu address), and start adding onboarding meetings to the calendar.
    - Make sure to share this new calendar with the new employee and other relevant staff.
    - Consider building in social/less formal lunches on the calendar for the first two weeks.
    - Assign one of the lunch dates to be an on campus or virtual tour of the department and/or campus.
    - Supervisor confirms start date, time for the first day of work.
    - Supervisor arranges a background check (if needed).
    - Supervisor adds New Employee Orientation to the new hire's calendar.
    - Supervisor readies the team's on-campus, remote, and hybrid work schedules to share with the new employee on their first day.
  - For remote employees:
    - Communicate to the team and stakeholders that the employee will be remote.
    - Set up Zoom appointments for the new employee with stakeholders you have identified.
    - Set up 3-4 meetings per day over the first two weeks instead of a few days with 7-8 meetings. This can be overwhelming in the remote environment.
  - For hybrid employees:
    - Communicate to the team and stakeholders that the employee will be hybrid and that some of the onboarding meetings will be held on campus and some will be held remotely, based on the parties involved.
    - Check-in with the employee to get a sense of their expectations and preferences for on campus and remote work during the onboarding period. Supervisors may have preferences and have discretion in this space too.
    - Set up 3-4 meetings over the first two weeks per day instead of 7-8. This can be overwhelming in the hybrid environment.
- Onboarding buddy connects with the new employee:
  - For all new employees:
    - The onboarding buddy is a point of contact support for new employees to feel welcomed and connected to resources and answers they need.
    - This is a space to discuss the job, work culture of UC Berkeley, and the department.
    - The onboarding buddy will meet with the new employee two weeks before they start work and also on the first day.
  - For employees who work on campus all of the time:
    - If meeting with other employees who work on campus all of the time, a physical meeting is appropriate.
    - If meeting with other employees who work remotely, a Zoom or phone meeting is appropriate.
  - For remote employees:

        - The onboarding buddy meetings will occur over Zoom or the phone.
    - For hybrid employees:
        - It's likely hybrid employees will interact heavily with other hybrid employees. If on campus schedules match for the new employee and onboarding buddy, an on campus physical meeting is preferred. If a telework time and date works best for the new employee and onboarding buddy, then a Zoom or phone meeting is sufficient.
- Supervisor plans first day of work:
    - For all new employees:
        - Consider, how can we welcome the new employee? Start their first day with a coffee meeting for example, with the agenda of reviewing their two-week onboarding schedule.
        - Supervisor plans for a team welcome meeting and/or social.
    - For employees who work on campus all the time:
        - If the entire team works on campus all the time, an in-person meeting/social is appropriate.
        - If the employee works on campus all the time and the team is remote or hybrid, then a Zoom meeting/social is preferable.
    - For remote employees:
        - Plan to communicate the team's working environments (on campus, remote, and in-person).
        - Most, if not all of the onboarding will occur remotely. Write out some questions you'd like to ask the employee on their first day about their experience with remote onboarding previously. If they share past experiences, ask what was helpful and what could be improved to better help welcome them to this role. If they have limited or no remote onboarding experience, create space for the employee to ask questions and to talk about their experience so you know how best to support their remote onboarding experience.
    - For hybrid employees:
        - Supervisors will work with new hybrid employees to determine if on campus or remote is the best approach for day 1.
        - If on campus is decided, it's important to notify those who will be physically in the office on the new employee's first day and to also give notice to those who are remote so they can welcome the new employee virtually via email, chat, or phone.
- Announce new staff member to the organization:
    - For all new employees:
        - Supervisor asks the new employee to send a brief bio and a photo.
        - Supervisor communicates an announcement over email to the organization with a CC or @ to the new employee.
        - If the team uses LinkedIn, this is a great chance to get the new employee quickly connected to the team for networking and identifying interests and connections.
        - In the communication, detail the type of work (fully on campus, remote, or hybrid), and ensure communication channels and contact details are shared.
- Make a personalized "welcome" banner / sign:
    - For new employees who work on campus all the time:
        - If hoteling is the norm, make a personalized welcome sign in a departmental communal

space. If the employee has a dedicated space, then a welcome sign at their work station is appropriate.

- For remote employees:
  - Making a virtual google slide “welcome” deck or a virtual background that can be used in introductory meetings will go a long way toward making the new employee feel welcomed.
- For hybrid employees:
  - Depending on the new employee’s onboarding schedule, a physical on campus or virtual welcome sign will be appropriate.

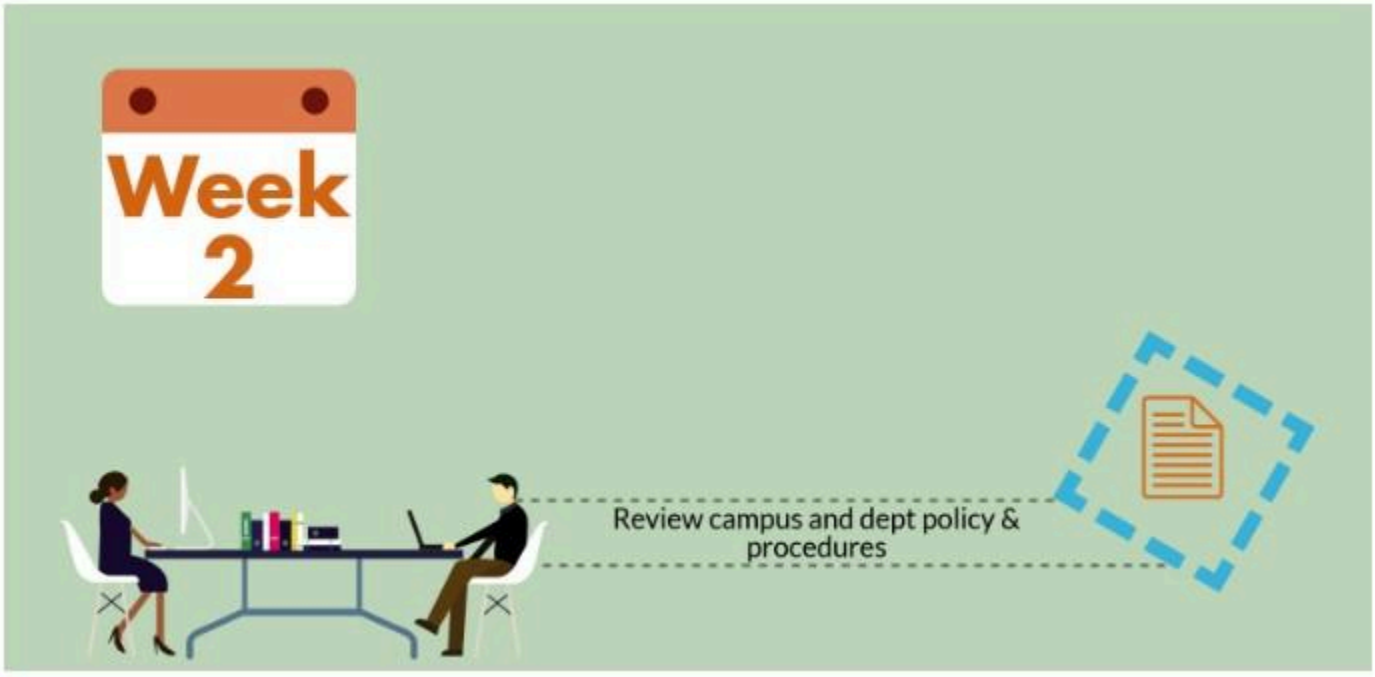
- Determine what computer/phone/access is needed:
  - For all new employees:
    - Supervisor works with the new employee to determine what computer/phone/other equipment is needed and coordinates ordering to ensure their workstation is fully functional on their first day.
  - For remote employees:
    - Supervisor arranges a virtual ergonomic review, which will help identify the right equipment ahead of the first day of work.
    - Tech equipment will need to be shipped to the employee’s remote working location.
  - For hybrid employees:
    - Supervisor arranges a virtual ergonomic review, which will help identify the right equipment ahead of the first day of work.
    - Tech equipment will need to be shipped to the employees remote working location and set up at their on campus dedicated space if applicable.
    - If hoteling, communicate the hoteling situation.


Week 1
Welcome new employee
Give a tour of the department
Meet with buddy
Review org charts and explains mission
Determine and schedule needed training
Describe relevant work procedures
Add new employee to all mailing lists, calendar events etc.
Register them for warnme.berkeley.edu
Review job description and PEM

Week 1

- Welcome the new employee:
  - For all new employees:
    - Supervisor greets new employee at the start of their first day and reviews comprehensive two-week onboarding schedule
  - For employees on campus all of the time:
    - In-person meeting, if possible.
  - For remote employees:
    - Over Zoom.
  - For hybrid employees:
    - Depending on the arrangement, physically in-person or Zoom are both appropriate.
- Give a tour of the department:
  - For employees who work on campus all of the time:
    - In-person tour, if possible.
  - For remote employees:
    - A remote tour is possible in a few ways. Someone who is working physically on campus could take their laptop or tablet with a camera through the physical location. The same is possible for locations around campus where Wifi is available. Another way to create a remote tour is through embedding images in a google slide deck, taking the new employee through each section, and highlighting key information.
  - For hybrid employees:
    - Depending on the employee's schedule, the tour may need to occur later in the onboarding process. It's possible the arrangements for a tour could be made on the first day, but this is a section of the onboarding that can wait for the right time and method. It could be that a virtual tour makes more sense. It could be that an on-campus tour is more appropriate. And, there could be a bit of both!
- Meet with onboarding buddy:
  - For all new employees:
    - Onboarding Buddy meets with employee and calendars 30 minute check-ins for the first six weeks.
  - For employees working on campus all the time:
    - If both the onboarding buddy and the employee work on campus all of the time, then in-person meetings are appropriate.
  - For remote employees:
    - If one of or both the onboarding buddy and new employee are remote employees, then Zoom meetings or phone calls are appropriate.
  - For hybrid employees:
    - If the onboarding buddy and new employee are both hybrid employees, some of the onboarding check-ins will be scheduled on campus and others over Zoom.
- Supervisor reviews org charts and explains the University's mission:
  - Review the UC Berkeley Principles of Community.
  - Share how the new hire's role contributes to the department/division and university's mission.

        - This can be done virtually or in-person.
    - Determine and schedule needed training:
        - Supervisor and new employee determine and schedule needed training (CalTime, bConnected, Berkeley People Management, other programs or systems). Review GROW and the Grow Your Skills page for additional information.
        - Many trainings are available online, though some training programs may require in-person attendance.
    - Supervisor shares Basic Cyber Security Requirements Checklist:
        - Ensure that the new employee is aware of the basic security requirements and cyber responsibilities for all employees who have a device that connects to the campus network.
    - Supervisor describes relevant work procedures to the new employee:
        - Check-in on the new employee's work-life needs and scheduling preferences.
        - Discuss on campus, hybrid, and remote operations, work hours, and schedule.
        - Share the preferred procedure for notification for vacation/sick leave/other leaves.
        - Discuss the steps and resources available for resolving problems and conflicts.
        - For supervisors onboarding remote and hybrid employees for the first time, do consider scheduling extra time with them to create space for questions, conversations, and for adjusting your approach to maximize their onboarding success.
        - Start discussions about the first few projects that will get them connected at the right scale and scope. Sharing your insights on what's going to be high priority over the next 30, 60, 90 days will help new employees organize their approach to successfully navigating their onboarding and probationary periods.
    - Supervisor adds the new employee to all mailing lists, calendar events, etc.:
        - Be sure to outline how the communication channels are utilized and to detail how the employee can ask for help with any of the methods of communication.
    - New hire registers for warnme.berkeley.edu
    - Supervisor reviews job description and Physical, Environmental and Mental Requirements (PEM) document



Week 2 - Review campus and dept policy & procedures

- Assist employee with ordering business cards (if needed)
- Review probationary period details with the new employee and schedule 3 and 6 month performance check-in conversations
- Review and schedule all Foundational Skills Training required for the new employee
- Review UC Berkeley's Whistleblower Policy

3 Weeks - Review campus resources and amenities

- Review campus resources:
  - Cultural Onboarding Toolkit for On-Campus, Remote, and Hybrid Employees
  - People & Organization Development
  - UC Berkeley Learning Center
  - Staff Organizations
  - Ombuds Office
  - People & Culture Employee Relations / Policies
  - University Health Services
  - Employee Assistance
- Review campus amenities:
  - Access to libraries, museums, performances, etc..
  -]Recreational Sports Facilities
  - Wellness programs
- Supervisor, employee, and buddy meet and discuss the onboarding experience and determine what is left to complete.
- Ask new employees how the recruitment, hiring, and onboarding experience could be enhanced for the department.

3 Months - Check in on performance progress and professional development planning

- Schedule and conduct a three month check in, discuss employee successes and opportunities for additional growth.
- Determine further training, development, and support needs.
- Discuss and create a professional development plan.

6 Months - Performance Review and professional development planning

- Schedule and conduct a six month check in on progress.
- Review probationary period process and onboarding to performance programs.
- Review / update professional development plan.