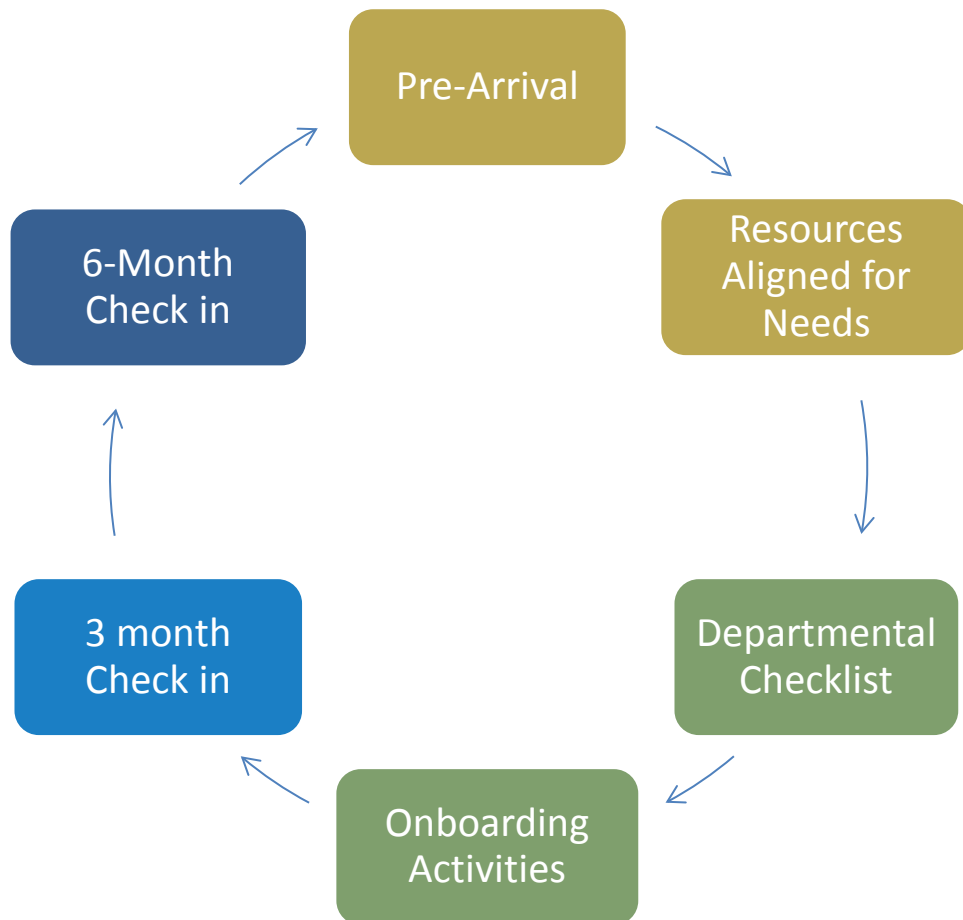# University of California, Office of the President

Strategic Leadership On-Boarding Program
(MSP & SMG Staff)

Pre-Arrival

Resources Aligned for Needs

Departmental Checklist

Onboarding Activities

3 month Check in

6-Month Check in

Leadership On-Boarding
Background & Purpose

Onboarding and integration is the foundation for a leader's success as they enter the UC organization.   As a key element of the talent management strategy, onboarding helps to accelerate and enhance their performance by engaging with the three areas of focus outlined below as well as addressing professional and personal needs from pre-arrival through their first six months. (INCLUDE HERE – COST OF TURNOVER)

The Manager's Role – Transitioning the New Leader: Four Key Areas of Focus

- **UC Business** – Define the business of the organization, who are the key stakeholders, how does the organization operate and where are the strengths and opportunities.

- **Leader Integration** – the socialization and acceptance of the leader as well as his/her acceptable of the organization is a key responsibility. A strategic approach to integration will increase the likelihood for success.   Provide resources and clear measures of success, tools to improve their learning agility and guidance on the factors that will help build a foundation of success.

- **Cultural Fit** – Assisting them to understand their role in the organization and understanding the commitment of UC's values and mission

- **The Role of Leadership** – Explain and set leadership expectations, outline the division or organization's strategic goals or initiatives.
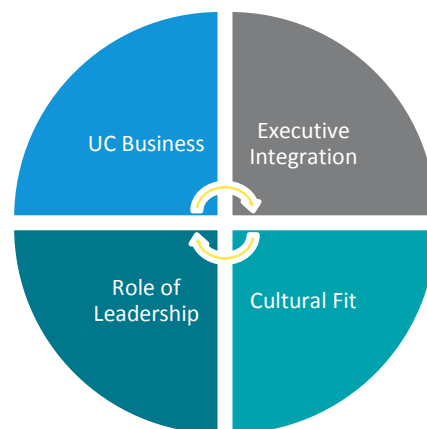
Transitioning the Leader

1. *Pre-Arrival Discussion.* The new hire receives a call from the Human Resources Business Partner to address onboarding questions (moving, relocation, benefits questions, etc. (*See page 3 for the Pre-Arrival Discussion Guide).*

2. **Alignment of Resources** – The Human Resources Business Partner coordinates the logistics to ensure office set up and all operations resources are aligned and utilizes the existing onboarding logistics program that has been established.

3. **Completion of Departmental Checklist** - The departmental checklist is a best practice tool to ensure all logistics and meetings are scheduled for the new hire. Departments may add to the checklist based on individualized needs. It's the responsibility of the HR Business Partner in conjunction with the Hiring Department to ensure the tasks on the checklist are assigned. *(See page 6 for the Leader Onboarding Checklist).*

4. **Onboarding Activities** – All new leaders are scheduled for New Employee Orientation, staff introductions, and a series of one-on-one meetings with key stakeholders and direct reports within the first 60 days. Senior leaders will assign a peer coach (buddy) to assist in helping the new hire navigate the UCOP system. In addition, systemwide meetings may be scheduled if appropriate for the new hire.

5. **90-Day Check-in** – after 90 days, the new hire will have an opportunity to provide feedback to and receive updates from their senior leader on their progress and transition. A discussion guide is provided for use with these conversations.   (See page 10 - the 90 day Discussion Guide).

6. **6 Month Check-in** – This is an opportunity for senior leaders to provide performance discussion updates and check in on the new hire's progress and provide further guidance. *(See page 10 for a Discussion Guide for Leaders).*

Leader Onboarding Best Practice Guide

Pre-Arrival

- Connecting with the new hire, assessing their needs (housing, child care, partner/spousal employment, etc.)
- Integrating their family
- Peer/Coach Buddy assigned by Direct Manager

5 days:

- Meeting with Direct Manager (welcome)
- Welcome Breakfast/lunch with the staff
- Introductions to direct reports, colleagues
- Peer/Coach Buddy meeting/lunch

10-15 Days

- Meetings with report to Direct Manager (check-in)
- Leadership Onboarding Completed
- Attends New Employee Orientation
- Peer/Coach Buddy meeting/lunch
- Executive Coaching Resources/Onboarding provided

30-60 Days

- Meeting with Direct Manager (set expectations and goals, answer questions)
- Department Key information and meetings
- One-on-One meetings with key stakeholders and direct reports
- Meetings scheduled with UC locations (if applicable)

60-90 Days

- Meeting with Direct Manager (check-in)
- New leader transition meetings with staff and senior leader
- Develop plans for change initiatives, organizational changes, strategic priorities

Leader Onboarding Best Practice Guide (continued)

90-180 days

- Meeting with Direct Manager (check-in)
- Solicit feedback from the new hire on the transition and ask about any changes he/she sees beneficial
- Gather feedback received in initial 90 days from key stakeholders and present themes to the leader.
- Determine progress and provide further resources as needed
- Ask for feedback on their transition
- Assess performance against goals

Pre-Arrival Discussion Guide

In preparation for your arrival, I'd like to ask you some questions to assist with your transition. We are looking forward to having you join us!

Would assistance with the following items be helpful to you?   _____

Contact with the University's approved moving vendors?   _____

Housing – will you be looking for temporary or rental housing?   _____

Contact with a realtor?   _____

School information?   _____

Employment assistance for your partner/Spouse: _____

Living in the Bay Area (information about living in the Bay area?)   _____

Follow-up Items: (include here)

PLACEHOLDER FOR RELOCATION COMPANY SERVICES

LEADER ONBOARDING	SUGGESTED TIMING
Set up new hire process and orientation (ensure desk, computer, and all operational items are being pulled together) Schedule for New Hire Orientation	Upon Offer Being Accepted
Send an e-mail announcement o your department announcing the new hire and copy the new hire (only after all internal background checks and offer has been accepted)	Week Before New Hire Starts
Send a system-wide announcement (if appropriate)	Week Before New Hire Starts
Set up meeting or telephone call with Benefits Manager to provided them an overview of Benefits	Upon Offer Being Accepted
If relocating to the area, provide resources and contacts for housing and movers	Upon Offer Being Accepted
Arrange for a peer/buddy for the new hire	Week Before New Hire Starts
Set up with Leader Onboarding counselor/coach	Week Before New Hire Starts

LEADER ONBOARDING	SUGGESTED TIMING
Prepare a schedule for lunch on their first day and introduce them to their buddy	First Day
Begin and End the New Hire's First Day (with a Face-to-Face Meeting	First Day
▪ A Welcome Event (e.g. Team Lunch) Can Be a Fun Way to Introduce Your New Hire to New Colleagues and/or their team	First Week
Provide Department-Specific Information, Including:	First Week

Provide Department-Specific Information, Including:

- ▪ Policies and Procedures
- ▪ Required Training
- ▪ Safety Information & Emergency Assembly Point

Direct Report Information

- • Organizational Chart
- • Direct reports Job descriptions and resumes
- • Most recent performance appraisals

Set up meetings with the President and other key leaders	First Two Weeks
Establish Goals and Ensure the New Hire Understands How Performance is Evaluated	First Month

LEADER ONBOARDING	SUGGESTED TIMING
Set up meetings with other key leaders around the System (if applicable)	First 3 Months
Schedule meetings with their direct reports (if applicable)	First Month
Schedule monthly check-in meetings	Monthly
Schedule an all-day session – New Manager Introduction Tool (attached resource)	First 3 Months
Arrange for six-month check-in discussion	Six Months

![University of California Human Resources]

Stakeholder Meeting Guidelines with Key Divisions

Schedule meetings as appropriate with key stakeholders from Divisions. Ensure stakeholders' meetings provide the new hire with the following information:

- Organizational charts
- Mission, strategic plans or initiatives
- Role and responsibilities of the particular organization
- Understanding of how the divisions work together and overlap with the new hire's role
  Example:

Academic Affairs	Chief Financial Officer	Chief Operating Officer	External Relations	Agriculture & Natural Resources
Academic Personnel & Programs	Budget Analysis & Planning	Energy & Sustainability	Alumni & Constituent Affairs	Chief Investment Officer
Diversity & Engagement	Capital Markets Finance, Capital Resources Management, Office of Loan Programs	Human Resources	Communications	Ethics, Compliance & Audit Services
Institutional Research & Academic Planning		Information Technology Services	Federal Governmental Relations	General Counsel
Research & Graduate Studies	Financial Accounting		Institutional Advancement	Health Sciences & Services
Student Affairs	Financial Services & Controls		Issues Management Policy Analysis & Coordination	Laboratory Management
	Procurement Services		State Governmental Relations	Academic Senate
	Risk Services			Board of Regents
				President Napolitano

Senior Leader Coaching: 90 Day Discussion Guide

In this session, the manager should focus on gaining insight into the new leader's impressions as well as providing answers to questions related to process, norms and culture. Below are some suggested questions to ask the new leader:

Questions to Ask:

1. **How do we compare to what you expected?**

2. **What is working well?**

3. **Based on your prior experiences, what ideas for improvement do you see?**

4. **As we position you for success, are there any concerns or barriers that you have observed that could derail you?**

5. **What do you need from me to ensure your success?**

Additionally, it is an opportunity for the senior leader to provide feedback to the new leader on any early themes or concerns observed or raised by colleagues or stakeholders.

Reflection and Stakeholder Feedback to new leader:

1. Early impressions of the leader's strengths.

2. Early impressions of the leader's development needs.

3. Give the leader suggestions to help him/her become more successful.

6 Month Performance Update

This is an opportunity for senior leaders to provide performance discussion updates and check in on the leader's progress and provide further guidance. Leaders are encouraged to seek feedback from stakeholders and others to obtain additional perspectives to share.

Questions to Ask:

1. Since our last discussion, do you want to add anything about how we compare with what you expected?

2. What has happened in terms of improvements that you have implemented?

3. Are there any new concerns or barriers that you have observed could derail you?

4. What do you need me to do differently to support your goals and initiatives?

5. Describe where you are with your goals and upcoming initiatives?

As before, it's important to provide feedback and reflect on the following:

1. How has the new leader done things differently based on any changes that were agreed upon at the 90 day discussion?

2. Impressions of the leader's strengths.

3. Impressions of the leader's development needs.

4. Give the leader suggestions to help him/her become more successful.

Resources

Relocation Services: Provides one point of contact for home marketing move management, temporary living, home finding and/or rental assistance

Cornerstone Relocation Services

Executive Coaching (Onboarding): Provides a roadmap for the organization and the new hire to achieve success factors, securing early wins, and avoiding derailers

Kadosh Consulting

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New Manager Introduction Tool: Provides open communication between a New Manager and his/her Team to reduce the amount of time it takes for a manager to develop a working relationship with the team.

New Manager Introduction Tool

Integration (Equipping Transitioning Leaders for Success)

http://www.ccl.org/leadership/pdf/research/ExecutiveIntegration.pdf