



# ***2019 ANNUAL MEETING***

OCTOBER 19 - 23

## **Making New Stars Shine: Effective Onboarding and Training of New Employees**

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# Objectives

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- Participants will develop a greater understanding of and generational perspective on the onboarding and training needs of today's new research administrators.
- Participants will learn the challenges that each panelist presenter has experienced and how these challenges were overcome through discussion.

# Outline

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- Background
- Training needs
- Current training programs
- Challenges
- Future Directions
- Q&A

# Who are we?

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UNIVERSITY  
OF  
CALIFORNIA

Berkeley  
UNIVERSITY OF CALIFORNIA

UCSF

UCDAVIS

UC SANTA BARBARA

UCLA

UC RIVERSIDE  
UNIVERSITY OF CALIFORNIA

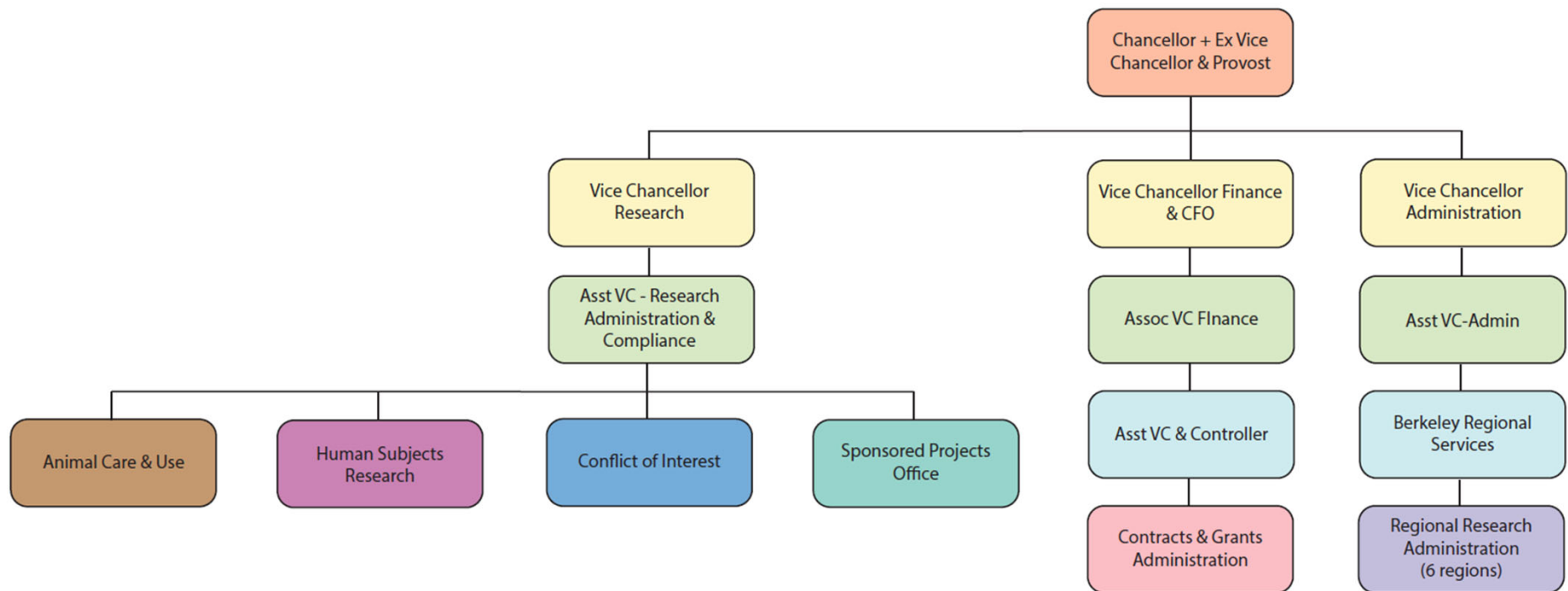
UC San Diego

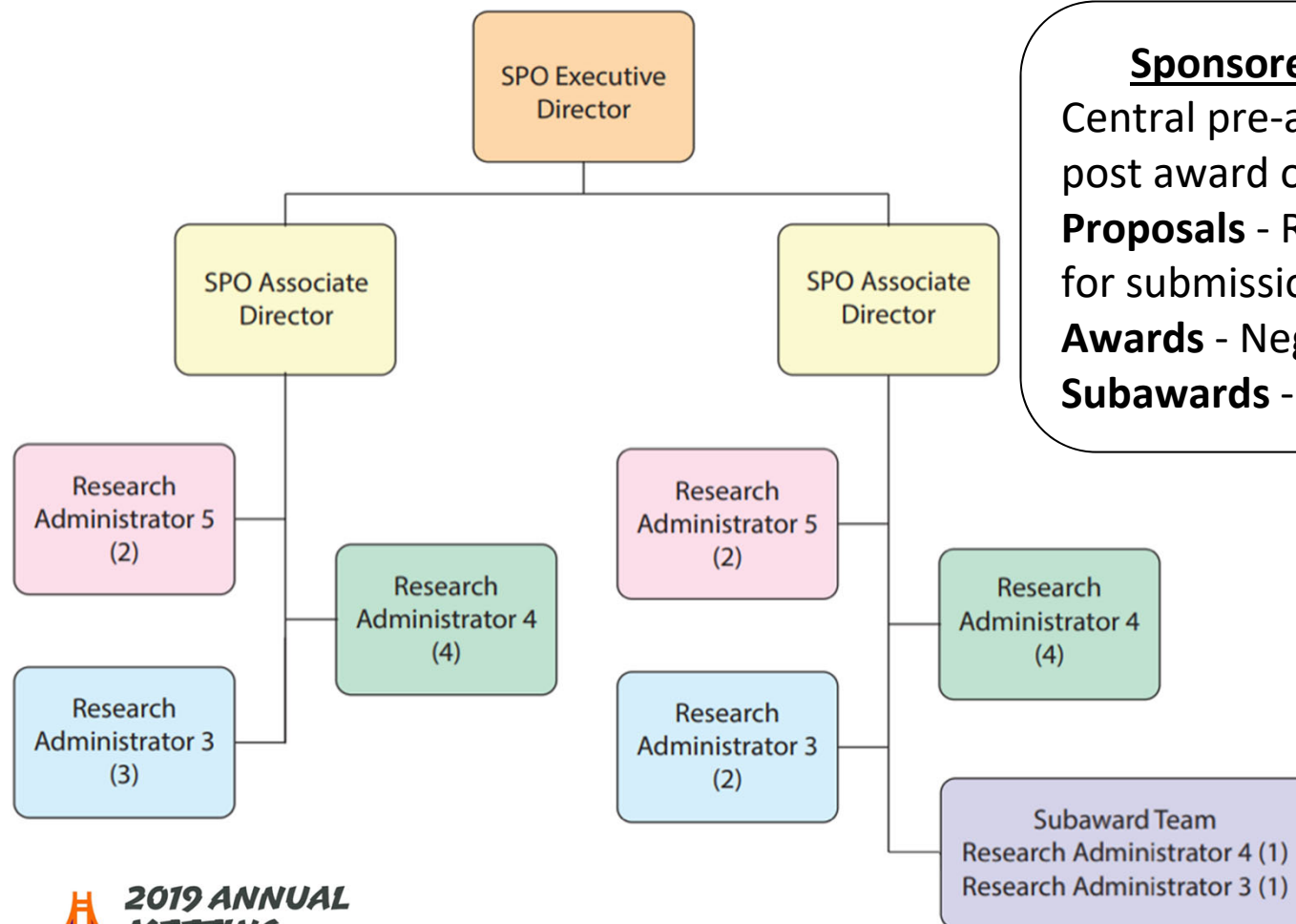
UCI University of  
California, Irvine

UNIVERSITY OF CALIFORNIA  
SANTA CRUZ

UNIVERSITY OF CALIFORNIA  
MERCED







## Sponsored Projects Office

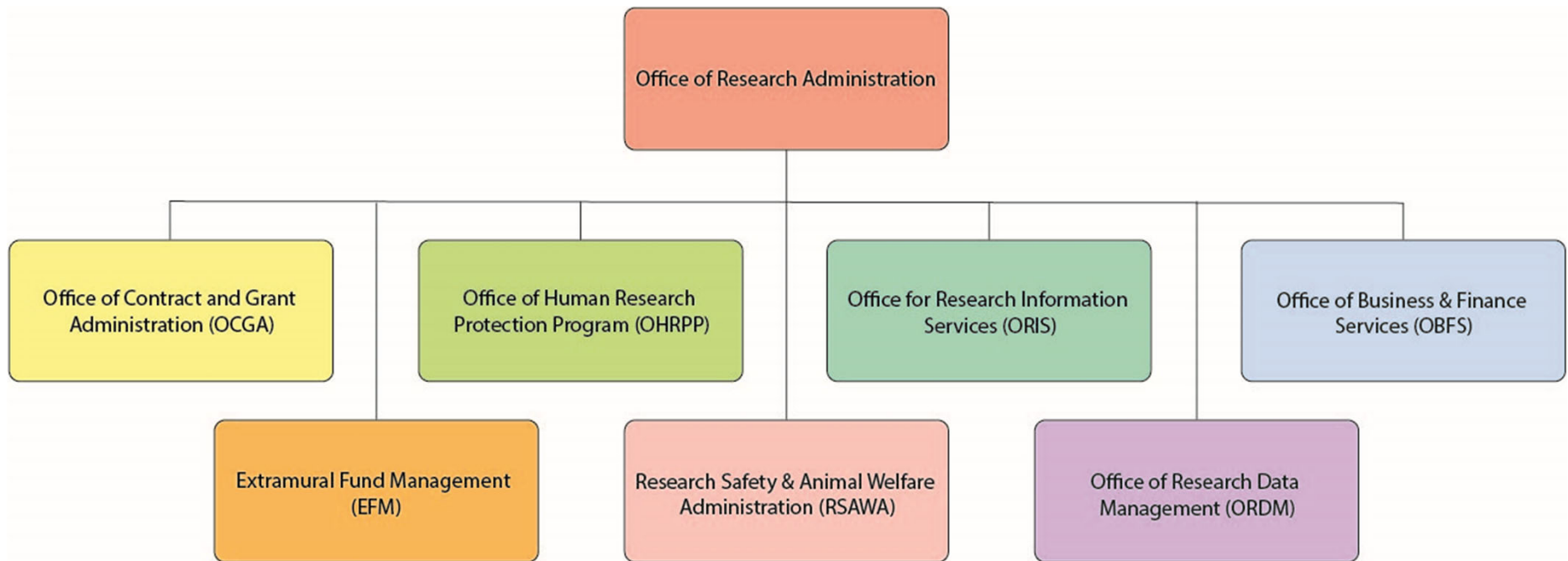
Central pre-award, non-financial post award office.

**Proposals** - Review & authorize for submission

**Awards** - Negotiate & accept

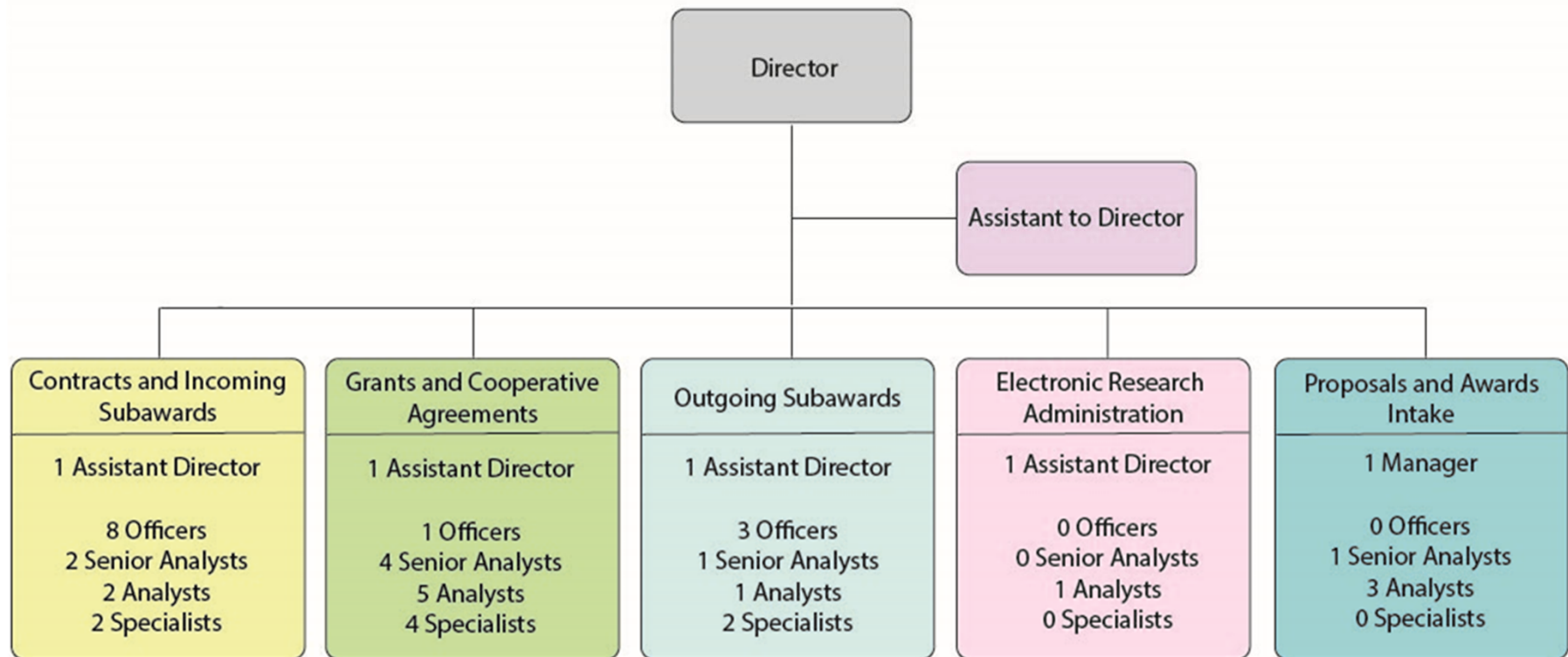
**Subawards** - Issue outgoing subs

- UCLA's Office of Research Administration (ORA)
  - ORA provides operational infrastructure, regulatory compliance oversight and guidance, financial management and reporting, and administrative services in support of the UCLA research program and the faculty, staff and students who are part of the campus research community.





## Office of Contract and Grant Administration (OCGA)



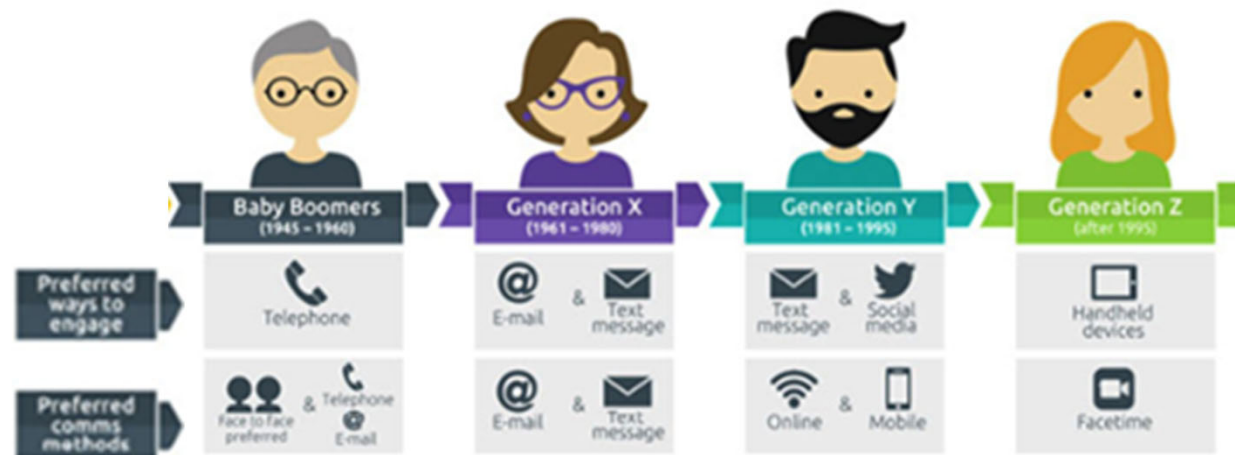
# Training Needs

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- Onboarding and training of new employees are vital to an organization's success
  - Employee performance (able to perform their job better)
  - Employee satisfaction (builds confidence)
  - Address weaknesses (brings up staff by strengthening areas an employee may need improvement)
  - Morale (we invest in you, we care, appreciate and support you)
  - Reduces turnover and the stress of being short staffed
  - Retention of talented employees
  - Cost of replacing employees (time and money)

# Training Needs

- Managing 4 generations of workers



- Each group - distinct characteristics, values and attitudes toward work
- Gen X and Millennials are the two biggest generations in the workplace right now.
- Multi-generational staff. Multi-generational customers (e.g. Principal Investigators and sponsors).

# Training Needs

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- Managing 4 generations of workers
  - **Baby Boomers:** Born mid 40s – 1960
  - **Generation X:** Born 1961 – 1980
  - **Millennials or Gen Y:** Born 1981 - 1995
  - **Gen Z, iGen, or Centennials:** Born after 1995
- Each group - distinct characteristics, values and attitudes toward work
- Gen X and Millennials are the two biggest generations in the workplace right now.
- Multi-generational staff. Multi-generational customers (e.g. Principal Investigators and sponsors).

# Baby Boomers (mid 40s - 1960)

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- From the huge population increase that followed World War II and the Great Depression
- Values personal growth, team involvement and personal gratification
- Strong work ethic, goal oriented, competitive
- Prefer one-on-one communication and phone calls
- Prefer empowerment and collaboration rather than “my way or the highway” management
- Learn from GenX - look outside organization for solutions
- Learn from Millennials - work/life balance

# Generation X, Gen X (1961 - 1980)

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- Birth rate was vastly smaller than the preceding Baby Boomers
- Work hard/play hard mentality
- Many spent a lot of time alone as children, latchkey kids
- Prefers to work independently
- Pat on the back or email congratulations works for Gen X
- Like to make quick decisive decisions
- Gen X managers are hands off, won't tell you how to do every step, won't give a lot of praise
- Learn from Baby Boomers - institutional knowledge
- Learn from Millennials - creative ideas and solutions

# Millennials (1981 - 1995)

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- Largest workforce—Currently 35% of the workforce, but 2025 will be 75% of the global workforce
- Variety—Millennials are multitasking pros and can juggle many responsibilities at once
- Work/Life Balance—Want flexible workplace schedules, environment, and rules
- Opportunities to Collaborate—Want to work in teams, share ideas
- Career Advancement—Values opportunities for career development
- Learn from Gen X and Baby Boomers:
  - How to navigate organization's political climate
  - How to work and influence other managers or leaders
  - How to communicate up and down

# Gen Z, iGen (Born after 1995)

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- First true generation of digital natives
- Facing extremely low rate of unemployment
- More cautious, less risk taking
- Excellent multi-taskers, but also easily distracted
- Expect structure, clear directions and transparency
- Less "in person" and "face to face" contact with others due to more time connecting via smart phones
- Wants to know plans employer has in investing in their future skills and career development
- Learn from other generations
  - work/life balance important
  - soft skills such as resolving conflicts, negotiating



# Current Training Program - UCB

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- Onboarding - Mentoring
- Ongoing training and professional development
  - Professional Development Days
  - Bridging the Bay
  - Leadership Experience in Administration Program (L.E.A.P)

# Onboarding - Mentoring

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- Each new staff is assigned 1-2 mentors
- Mentors are selected from senior and/or principal research administrators
- Scope of mentorship depends on the experience level of the new hire
- Guidelines with list of activities to cover and roles spelled out for mentor, mentee and supervisor

# Professional Development Days

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- Two professional development days per fiscal year per CGO
- Supervisor's approval is not required if no cost is required of the office. CGOs are only required to notify supervisor at least one week in advance.
- CGOs may use professional development days as they see fit

# Bridging the Bay

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- Participant-driven multi-campus learning and sharing forum
  - Technical skill building
  - Soft skill development
  - Process, policy and tool sharing
  - Career path discussions
- Location rotates between campuses
- Minimal costs, maximum participation opportunity
- Networking opportunity

# Leadership Experience in Administration Program (L.E.A.P)

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- Prepare senior SPO CGOs (Levels 4 & 5) for current and future leadership opportunities within SPO.
- Up to two Contracts and Grants Officers (CGOs) may participate in L.E.A.P. each academic year.
- L.E.A.P. program based on each CGO's level, career interests and leadership goals
- Provides leadership opportunities not generally available without a supervisory level appointment
- Allows others to view the L.E.A.P. participant differently as a peer leader

# Current Training Program - UCLA

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- Cursory training within the first few weeks
  - Overview of the internal electronic systems and online manual
  - Introduction of the S2S system for federal grant submission
  - Individual meeting with the Assistant Directors to receive an overview of the team
  - Printout of Standard Operating Procedures

# Current Training Program - UCLA

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- Sustained Training
  - Either assigned mentoring to others or direct training by the Assistant Director
  - Weekly individual meeting with the Assistant Director
  - Campuswide “Master Training Class”
  - Professional conferences
  - Webinars

# General Challenges

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- Hard to recruit experienced research administrators
  - Mismatch of expectations in skills and salary
  - Either too specialized or too much of a generalist or lack of practical experience
  - Unemployment low
  - UCs compete with each other for the best research administrators



# General Challenges

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- Policies and procedures are complex
  - Need staff with strong understanding of their responsibilities and their role
  - Consistency
  - Institutional knowledge and a variety of funding sponsor specific requirements
  - Research Administrators now require an expanded knowledge base to properly perform their duties

# General Challenges

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- Technology continues to evolve
- Lack of a dedicated trainer or training program
  - Translates to lack of consistency with new staff

# Challenges - UCLA

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- Grants Team slowly lost staff in the past three years
  - Compared to three years ago, 6 of the current 15 remain with this group
- Grants Teams has not been able to retain staff
  - Many who were hired since three years ago and have since left for a variety of reasons
- Training/Re-training “Senior” level employees

# Challenges - UCLA

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- Contracts Team went through an organizational restructuring
  - Compared to three years ago, 10 of the current 15 remain with the group but includes an increase of three FTE positions
  - Implementation of a dedicated group for incoming subgrant proposals and awards from three existing staff with little practical research administration experience

# Challenges - UCLA

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- Too many direct reports for both Assistant Directors of the Contract and Grant Teams
- Inconsistent messages and guidance for those not mentored by their direct supervisor
- Specialization leading to lack of professional development and growth
- Outdated SOPs due to constant updates to processes

# Future Directions - UCLA

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- Better tools to distribute information so everyone can stay up-to-date
- Develop a manual for award negotiations and proposal review
- Develop a handbook for major Sponsors for those completely new to Research Administration

# Challenges - UCB

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- Mentor/Mentee match
- Inconsistency
- Seeing the big picture
- How to keep staff engaged
- Budget

# Future Directions - UCB

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- Would like to be multifaceted and flexible when training staff, recognizing different generations may have different needs
  - similar to differentiated instruction
  - offer different ways to disseminate new information, based on level or need



# Future Directions - UCB

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- Possible areas of change
  - Revamp mentoring program
    - Experts by area, play to people's strengths, include reverse mentoring
  - Participate in UC system-wide opportunities
    - Negotiator's Handbook
    - FAR guidance team
  - Join forces/share the work with other institutions

***How about you?***

# Questions?

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