



ENGAGEMENT TOOLKIT FOR LEADERS

FOSTERING WORKFORCE CONNECTION



The Employee Engagement Toolkit connects managers with resources to foster belonging, connection, and engagement throughout different phases.

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ICON DICTIONARY

These helpful icons are used throughout the toolkit to highlight key information, resources, tips, and next steps for readers.

NEW TOOL



Internal or external tools, such as sample templates or guides.

INTROSPECT



Opportunity to explore ideas and leverage tool shared for personal reflection

KEY OFFICE



Notable Columbia departments

TALKING TIPS



Guides to spark dialogue or tips to lead successful conversations

POLICY



Refers to an existing policy or formal Columbia form

REMINDER!



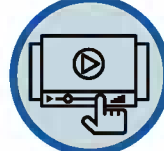
Important reminders, such as relevant best practice, websites, or key language

FURTHER READING

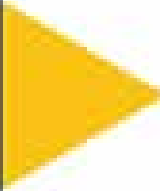


Recommended reading to support topic learning

VIDEO WISDOM



Recommended videos to further explore topic



Engagement Tool Kit

Sections of Interest

For Managers

1

Onboarding Tools & Best Practices

Ongoing Development and Growth

Performance Management in Practice

Retention and Career Development

For All Employees

2

Employee Resource Group Information

CUIMC Lingo

Tripartite Explanation

Building a Community of Well-Being at CUIMC

Additional Resources or New Employees

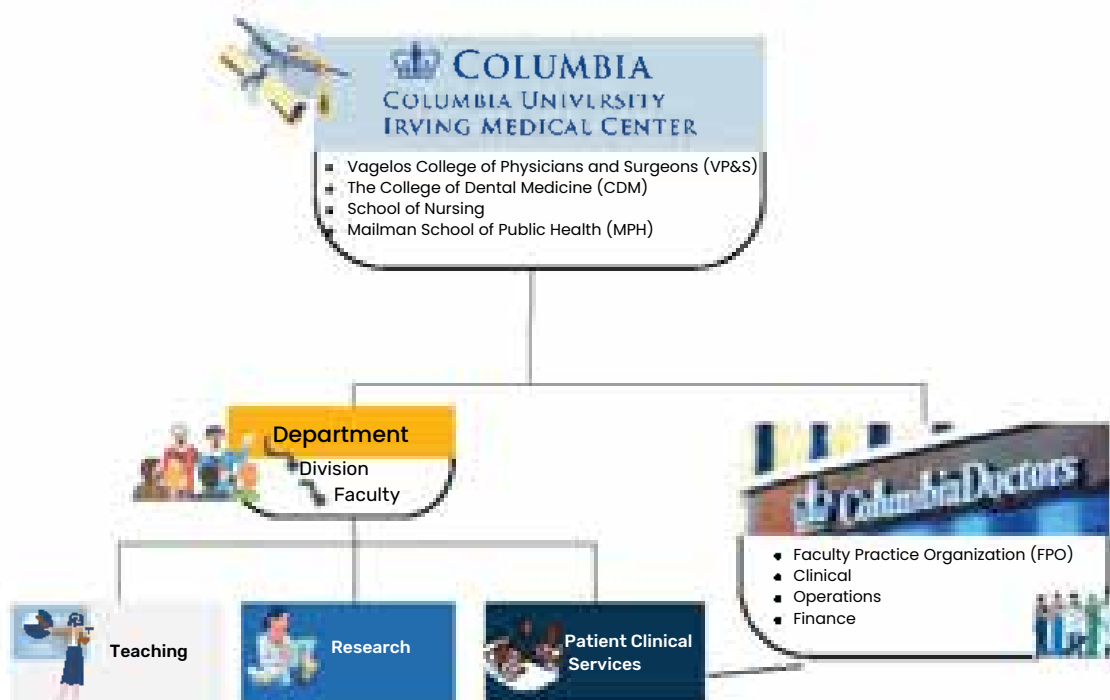
Networking & Mentorship

Learning & Development Opportunities

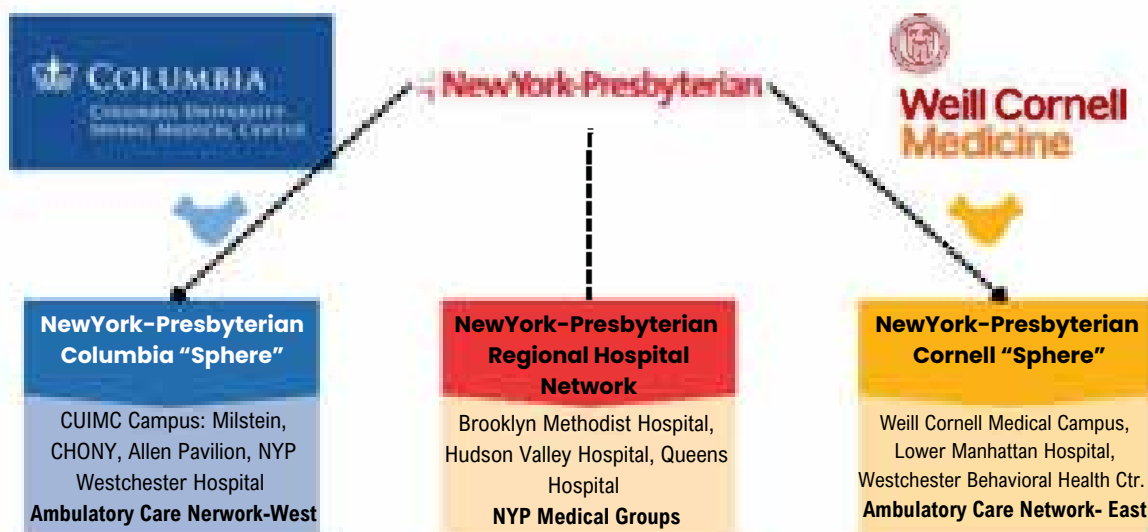
The Tripartite System

Advancing Care Through Collaboration

“The Tripartite” is often the phrase used to the three organizations, Columbia, New York Presbyterian, and Weill Cornell Medicine. Take time to familiarize employees with this system so they can integrate with our community and our Teaching Hospital Model:



Columbia University's Sagelos College of Physicians and Surgeons (VP&S) has been affiliated with NewYork-Presbyterian Hospital since 1998, when New York Hospital merged with Columbia-Presbyterian. This tripartite collaboration between VP&S, Weill Cornell Medicine, and NYP exemplifies the shared commitment to excellence, research, and patient care.



MEET CENTRAL HUMAN RESOURCES

"At CUIMC HR, we provide best-in-class support to our campus ... We strive to make HR processes more streamlined, transparent, and overall easier, to enhance the work of our colleagues and clear away roadblocks in their path to success ... Tell us your goals, and we'll help you get there"

Neil McClure

Chief Human Resources Officer



While CUIMC is a large organization, you're not alone - our talented HR team is here to support you! Your senior HR business partner understands your department's unique priorities and is your go-to resource for guidance on team needs big and small. At CUIMC, we know our people are everything. So in partnership with your HR partner, let's cultivate an environment where our teams can thrive.



Check out our CUIMC Human Resources Website [HERE](#)



WE ARE CUIMC

We are a community of 13,000 faculty and staff. We are diverse, collaborative, respectful, committed, proud of our mission, and dedicated to its success. We are CUIMC.

Columbia University Irving Medical Center (CUIMC) is home to four nationally renowned professional colleges and schools located in northern Manhattan.



Vagelos College of Physicians and Surgeons

Founded in 1767, the College was the first medical school in the nation to provide full-tuition scholarships. [CLICK HERE](#) for VP&S Strategic Plan.



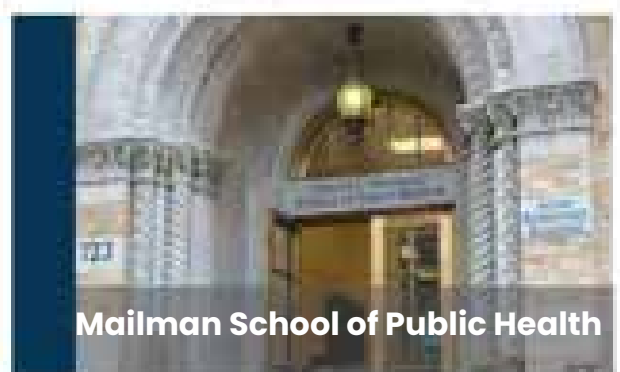
The College of Dental Medicine

Founded in 1916, Columbia University College of Dental Medicine, is a leader in precision dental medicine and community oral health. [Click here](#) for more.



School of Nursing

Established in 1892, it was the first to offer a master's degree in a clinical nursing specialty. [Click Here](#) for more.



Mailman School of Public Health

For over 100 years, the Mailman School of Public Health has been a global leader in advancing education, research, and practice. [Click Here](#) for more.

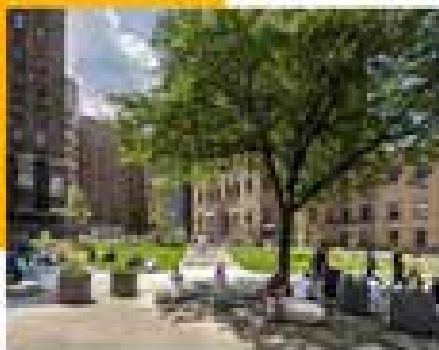
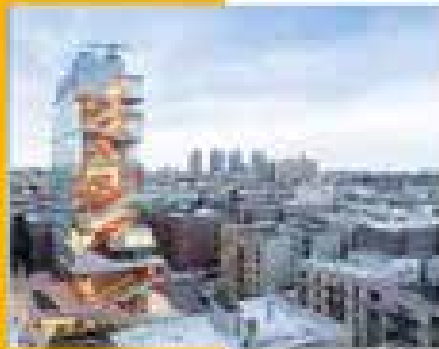
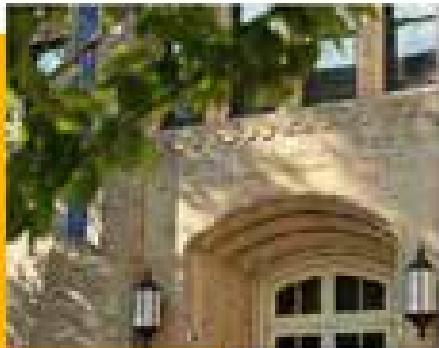
Beyond academics, CUIMC provides exceptional patient care with over 1,800 expert physicians, surgeons, dentists, and nurses. We are devoted to combining innovative treatments with compassionate care for each unique patient. CUIMC is shaping the future of medicine through its multifaceted dedication to research, education, and clinical excellence.



CUIMC LINGO:

A Guide to Frequently Used Acronyms

Navigating a wide range of acronyms at a new institution can be daunting. This list covers common CUIMC lingo. For an expanded list, [CLICK HERE](#). Explaining acronyms thoughtfully ensures colleagues feel informed, included, and ready to engage.



ARC

Finance System used by Columbia for Accounting and Reporting

CRO

Clinical Research Organization/Contract Research Organization

DA

Departmental Administrator

EMR

Electronic Medical Record – we use Epic

EPIC

Epic is our EMR, while EPIC is the Education for Persistence and Innovation Center at Teachers College

FPO

Faculty Practice Organization

HIP

Herbert Irving Pavilion

MSPH

Mailman School of Public Health

NYP

New York Presbyterian

PH

622 West 168th St. Presbyterian Building

PAC

People Soft @ Columbia Website

PI

Principal Investigator

Rascal

Columbia University's Research Compliance and Administration System

TLAM

Time & Absence in PAC

UNI

University Network ID, your log in identification to Columbia Systems

VEC

Roy and Diana Vagelos Education Center located on 104 Haven Ave.

Employee engagement is vital to achieving our mission. When employees feel positively connected to their work and our organization, they are more likely to perform to the best of their ability and support our goals. There are several drivers of engagement that managers can focus on:

Help employees understand what's in it for them. Highlight development opportunities and other benefits of working at CUIMC. Opportunities for growth and career paths fuel motivation.

Foster a culture of respect and kindness. Uphold our Code of Conduct policies to promote diversity, ethical behavior, and professionalism. Employees want to feel proud of where they work.

Provide opportunities for growth. Employees crave learning and progress in their careers. Offer training, stretch assignments, and allocate time for learning and development opportunities.

Encourage collaboration and communication. Create open channels for sharing ideas and feedback. Engage employees in cross-functional work that allows exposure to other disciplines and allows them to exercise their expertise in different ways.

Recognize and appreciate contributions. Express gratitude and celebrate wins, both big and small. Engaged employees feel their work is meaningful and valued.

By focusing on these drivers of engagement, managers can play a key role in cultivating an engaged, high-performing workforce.

Psychological SAFETY

What is it?

Psychological safety refers to an environment where people feel secure, included, and encouraged to openly share ideas, ask questions, and take risks without fear of judgment. Employees can ask questions, raise concerns, and admit mistakes without concern of being excluded or mocked.

Why is it important?

Fostering psychological safety is critical during onboarding so new hires feel comfortable voicing concerns, seeking clarification, and presenting suggestions without worry of negative consequences. They will not instantly feel a sense of belonging – as managers, it's our responsibility to actively cultivate it.

Suggestions:

- Keep your door open and make yourself approachable.

- Actively solicit new hire perspectives in meetings. Empower them to advocate for feedback.

- Respond positively when questions are asked.

- Admit your own mistakes.

- Recognize contributions publicly.

- Lead by example in being transparent.

VIDEO WISDOM

For an in-depth overview on the importance of psychological safety specifically in healthcare, [check out this insightful talk](#) by Amy Edmondson, the Harvard professor who pioneered the concept.

SUPPORTING YOUR TEAM

When teams make an effort to understand who employees are as individuals, it makes them feel respected, valued, and able to bring their authentic selves to work. Showing genuine care for their unique needs and background fosters a supportive environment where employees can thrive professionally and personally. A part of this equation involves the following:

Community and Professional Growth

At Columbia University Irving Medical Center, we believe that achieving excellence is inextricably linked to striving for the highest standards in workplace community building and professional development.

Making workplace community central to our culture communicates to our stakeholders that they are a valued part of our organization. At CUIMC, implementing initiatives like balanced policies, training, mentorship programs, and employee resource groups gives people the resources and community support needed to thrive.

[CLICK HERE](#) to learn more.

Flexible Work Arrangements (FWAs)

Life is busy- whether you're employees are caring for kids or aging parents, pursuing education, managing health needs, or simply seeking better work-life harmony, flexible arrangements like flextime, telecommuting, and alternative schedules empower us to show up as our best selves by fitting work into our whole life picture. Our HR partners are well-versed in Columbia's flexibility policies and can advise on arrangements customized to each employee's needs. Maintain an open dialogue with staff to find creative solutions that work for everyone. [CLICK HERE](#) to learn more.

Additional Reading: [University Policy on Fully Remote Work](#)

Well-Being at CUIMC

CUIMC has adopted the Surgeon General's National Well Being Model to holistically support employee health, satisfaction, and ability to perform. This model, with equity and equity at the center, focuses on:

- **Protection from Harm:** Prioritize workplace physical and psychological safety
- **Connection & Community:** Create cultures of inclusion and belonging
- **Work-Life Harmony:** Provide more autonomy over how work is done
- **Mattering at Work:** Build a culture of gratitude and recognition
- **Opportunity for Growth:** Foster clear, equitable pathways for career advancement

As stated by the Well-being Office, "The voice of the CUIMC community is fundamental to our mission and our approach." This model provides a framework, driven by those we serve. Managers play a key role in cultivating these dimensions of well-being among teams. Together, we can build a culture of belonging that empowers people to thrive.

FURTHER READING



The Surgeon General's Framework for Workplace Mental Health and Well-Being



Valuable resources supporting a culture of well-being include:

CUIMC Well-Being Best Practices Toolkit

Provides managers with strategies to cultivate well-being on their teams.

Well-Being Leadership Program

In Partnership with Cope Columbia and CUIMC Well-Being, PDC offers a leadership learning & development program focused on promoting well-being for self and for teams.

[Click here to register via Saba](#)

Well-Being at CUIMC

At CUIMC, we recognize that employee well-being is essential for personal and organizational success.

That's why we have established a wide range of programs and resources to support our employees with a wide range of well-being priorities. As part of the greater Columbia community, our staff also has access to the central HR Well-being Office which provides an additional suite of services such as:

- Ergonomics programs
- Physical Fitness classes
- Sleep Resources
- Travel Assistance
- Work/Life programs
- and much more!

Learn more about Well-Being Services by visiting:

[CUIMC Well-Being Initiative](#)
[CU HR Well-Being](#)

We encourage employees to leverage both these offices to support their overall health and ability to thrive. Our goal is for you to know that CUIMC genuinely cares for your whole self – and we back that up through robust wellbeing infrastructure scaled to serve you.

CONNECTING EMPLOYEES TO KEY OFFICES

Columbia offers an extensive network of offices and services to assist employees in their developmental journeys, aid in achieving both personal and professional aspirations. Below we highlight some essential offices that teams should acquaint themselves with. We encourage managers to remind employees of resources during team meetings. Do not hesitate to contact them for assistance.

The People Development Center

The People Development Center (PDC) offers professional development opportunities for Service Corp employees and Columbia Officers via tailored learning solutions.

Most programs are at no cost to departments and offer participants the opportunity to network, apply theoretical knowledge, and explore new ways to advance their competencies. Simply stated: *Columbia don't just find great talent, we continue supporting professional development and personal growth.*

Office of Well-Being

This office is working hard to address the immediate and long-term needs for achieving and sustaining well-being in the workplace at CUIMC. Check out

[**The Well-Being Survey report**](#)

[**The Well-Being Best Practices Toolkit for Leaders**](#)

Please contact well-being@cumc.columbia.edu with questions, feedback, and input.

CopeColumbia

This office's mission is to foster collective well-being and resilience by sharing evidence-based coping strategies, facilitating access to peer support, including:

Peer-Support Services

Meditation, Relaxation and Guided Practice

Trauma, Grief, and Loss Resources

For inquiries, contact copecolumbia@cumc.columbia.edu

ADDITIONAL KEY OFFICES

Office of Work/Life

Columbia University's Office of Work/Life fosters the well-being of the Columbia community and its people in their pursuit of meaningful and productive academic, personal, and work lives.

This office can provide help in:

- Exploring Child Care & Schooling Options
- Find Care for Adults & Elders
- Navigate the NY Housing Market
- Access Lactation Rooms

The Office of Equal Opportunity and Affirmative Action

The Office of Equal Opportunity and Affirmative Action (EOAA) prevents and responds to discrimination, harassment, and retaliation at Columbia. This office develops and implements policies and procedures that address prohibited conduct in accordance with relevant anti-discrimination laws.

The Ombuds Office

The role of the Ombuds Office is to serve as a confidential, informal, and impartial resource for faculty, students, and staff who may have a University-related concern or problem. This office offers:

- Clarification on University policies
- Coach for difficult conversations
- Provide informal mediation

PROFESSIONAL NETWORKS: EMPLOYEE RESOURCE GROUPS

At CUIMC, we believe that professional connections are vital for growth and innovation. That's why we wholeheartedly support our Employee Resource Groups (ERGs). These voluntary, employee-led groups bring together people from all backgrounds and experiences.

ERGs empower members to support each other personally and professionally. They also help CUIMC build an enriching culture where everyone can thrive.

By participating in ERGs, you can connect with coworkers, find mentors, develop leadership skills, and give back. You'll help make CUIMC a place where various perspectives drive innovation and excellence.

We invite every employee to join an existing ERG or start a new one. Just contact custaffdiversity@cumc.columbia.edu to learn more. Let's build community and foster professional connections – together.

Click ERG group to visit the dedicated website and learn more! New ERG groups can always occur!

Employee Resource Groups (ERGs)

African, Black & Caribbean

Asian Pacific Islander

CUIMC Women

CUIMC Women in Tech

Disability

Islamic Cultural

Jewish Cultural

LatinX

LGBTQ+

Veterans

Working Parents

DON'T STRESS, WE'VE GOT YOUR S.O.S!

Employees need to know what to do just in case they ever feel unsafe or uneasy on campus. Columbia's network of Red Lion safe havens allow employees to seek help from local merchants. If needed, they will contact Columbia Public Safety or police until security arrives. Check out the list of safe haven locations and give our emergency protocols a quick review so you know how to guide others. Though we hope you'll never need these resources, it brings peace of mind knowing support systems are there. Our top priority is keeping our CUIMC community protected.

Safe Haven by location:

The Medical Center

Manhattanville

Morningside Campus

Emergency Protocols:

For the Medical Center

Sign up for emergency text messages from the University.

This is the Safe Haven sign visible on local community storefronts Over 130 businesses are Safe Havens. At businesses featuring this Red Lion, you can ask them to call Columbia University's Department of Public Safety or the police. See how many you can spot on a walk around campus to familiarize yourself with them.

Preparing for New Hires

Consider the following four tips when the team is preparing to welcome a new employee for the most successful onboarding.

1 Block off the Calendar

Scheduling designated time well in advance on the calendar for welcome activities demonstrates to the new hire they are a priority. Blocking time on the team's schedule to give the new employee a tour or have lunch together during the first day can make a positive impact on the new hire's experience.

2 Draft a Schedule

A meet and greet & training schedule helps map out a new employee's critical first days, weeks, and months. This offers clear direction of what to expect. Structure during the first week can alleviate much of a new employee's worries as they feel more prepared understanding how their days will be structured.

3 Plan Introductions

Planning thoughtful introductions to new members of your team gives them context and provides insight on how those connections will help them excel. Consider doing the following in advance:

- Send a welcome email (include professional background, interests, picture)
- Forward meeting agenda and presentations from past meetings

4 List of Resources

As you prepare for your new hire's arrival, determine what trainings, system access, and other resources they will require to be productive and compliant. Allocating time for the new employee to complete trainings, test access, and review departmental materials supports a smooth transition.

FURTHER READING



- [CUIMC New Hire Checklist](#)
- [SHRM Onboarding Mistakes to Avoid](#)
- [LinkedIn Learning: The first 90 Days](#)

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5



LOOKING INWARD: INTROSPECTION FOR MANAGERS



Bringing a new team member onboard is the perfect catalyst for managerial self-reflection. Reflect on your expectations for the new hire and opportunities to eliminate obstacles they may face. Practice introspect to best understand role in shaping team norms and driving the new hire experience. Answering the questions below will prompt you to identify the best tactics to support the newest member of the team. Keep self-reflection as an ongoing practice – it helps you evolve and meet the ever-changing needs of your team.



What type of culture do you wish to cultivate? Does your leadership style prompt others to bring forth ideas?



Assess the existing team dynamics – what are the highlights of success? What areas need adjustments?

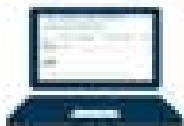


Examine why the role/position opened – does it address structural gaps or emerging needs?



Get Up to Speed: Introducing CUIMC through Video

As new employees get acclimated, we encourage them to view our **New Hire Video Series** and the new Time & Labor and Absence Management (TLAM) resources. This comprehensive set of videos walks through key topics such as:



[UNIs](#)



[TLAM](#)



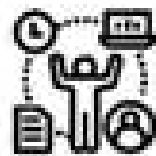
[VPN](#)



[DUO security](#)



[Payroll System](#)



[Other Employee Resources](#)

The links above contain valuable information and watching them will efficiently bring new hires up to speed on essential systems and resources.

The videos are an important part of our onboarding process, so be sure include to discuss during the first day.

THE FIRST WEEK GUIDE

Sample Schedule & Template



INTRODUCTION:

Let's map out a productive and memorable first week! Use this template to draft a day-by-day schedule for the initial 5 days. Consider including:

Meet & Greet

What are the introductory meetings they should have? Can any be pre-scheduled?

Breaks

Lunch breaks are an important opportunity to role model recharging, connect teams, and connect with new hires.

Tours

Tours of campus help orientate a new employee. Weather permitting the PDC Induction Camp offers an in-person tour in partnership with facilities management ([click here](#))

Review Departmental Tools & Initial Assignments

Allocate time to review resources, tools and critical systems to succeed in the role. Establish upcoming deliverables and milestones to prepare for successful completion.

EMPLOYEE INFORMATION

Name

WEEK ONE

Date	Activity	Attendees	Objectives
Day 1: Morning	Meet & Greet	Jane Doe	Supervisor meet and greet Work station welcome
Day 1: Morning	Meet & Greet	Amelia Earhart	Onboarding buddy meet and greet Office tour Q&A
Day 1: Afternoon	Team Lunch	Department - Wide	Team Lunch (calendars blocked / catered)
Day 1: Afternoon	Training	Edwin Armstrong	Training introduction and access testing
Day 2: Morning	Training	Amelia Earhart	Shadowing in preparation for project/ review report.
Day 2 Afternoon	Meeting	Jane Doe	Shadow project meeting and introductions (agenda sent)

THE FIRST WEEK GUIDE

TEMPLATE

EMPLOYEE INFORMATION

Name

WEEK #

[illegible]



HOW CAN WE INTRODUCE PERFORMANCE CONVERSATIONS?

It may feel premature to have performance or professional development conversations with recently hired employees, however this is a crucial step in ensuring their understanding of success at the organization and demonstrate commitment to their development. Consider covering the following topics:



Current State

- What is currently happening at Columbia and in the department?
- Any key milestones or deadlines forthcoming?



Define Success

- What are the key performance indicators (KPIs) for the department?
- How is success defined in the person's role?
- How are performance goals established and monitored?



Risks

(Consider patient quality and safety, financial, and legal)

- What are risks in this area of work?
- How does the department mitigate and what is the employee's scope?



Follow-Up

- What are the norms for communication?
- What's the process for questions / check-ins?

PROVIDE FRAMEWORK:

Define framework for performance measurement and provide corresponding resources so they may prepare for the task at hand. Consider sharing copies of:

- Job description
- Organizational chart
- Relevant competency model
- Overview of expected behaviors
- Data/ bench marking reports, or strategic plan information

LEVERAGE THE ENTIRE COLUMBIA ECOSYSTEM:

Leverage team members and existing programs to advance objectives, partner with Leadership, Human Resources, and key offices, such as People Development Center, to promote informative introductions, facilitate networking, and begin professional development planning.

Mapping a Roadmap:

Success and Setting Milestones

Define Success Early

01

Defining success by milestones (first week, first 30-60-90 days, mid-year)

Establish **clear objectives** and performance expectations

Outline priorities and what are the “norms” for check-ins/ escalations

What do they need to do and by when?

How frequently should they provide progress updates?

What are the team norms regarding communication?

What activities are not a priority but stretch assignments or “nice to haves” ?

How do the high-urgency items impact the department / support the mission/ align with overarching goals.

How is **performance measured** for the department and individual?

What **resources** are available, consider tools (job aids, trainings) and co-workers (experts in relevant areas)

Feedback is ongoing, consider pre-scheduling future **check-ins**

Facilitate the **meet & greets** by scheduling and providing notes on stakeholders and collaborators

Performance Management

02

Proactively implementing performance management through clear goal-setting, regular feedback, and ongoing development empowers employees to maximize their contributions, growth, and success. Check out HR's **guidance** on Performance Management for more tips.

In addition to aligning employee with overarching goals, partner with them to understand their career and development objectives.

Excellence in Performance: Employee Expectations



Managing employee performance and expectations begins at onboarding. Explore the following tips for encouraging accountability and empowering independence.

Promoting Accountability

- As a manager, model accountability through integrity, reliability, and transparency.
- Provide clarity by stating team and individual responsibilities and success metrics.
- Offer coaching and support while holding employees to high standards.
- Conduct regular check-ins and reviews to align on expectations.
- Celebrate wins and discuss areas for growth to continue raising the bar.

Encouraging Independence

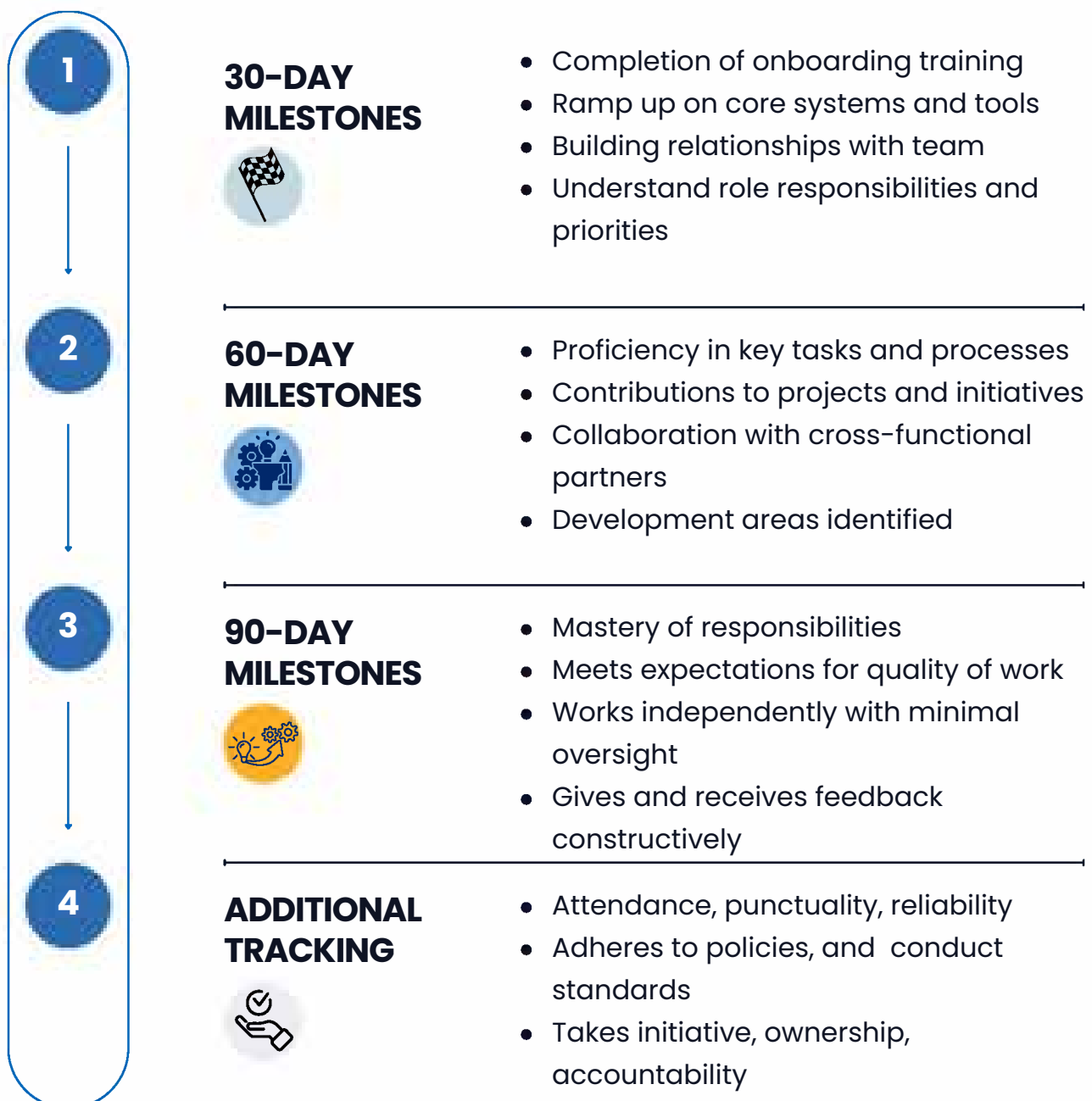
- Gradually shift from prescriptive instructions to offering autonomy.
- Provide high-level guidance while allowing employee discretion on execution – adjusted by scope of work and competency levels.
- Leverage check-ins to assess capacity for independent work.
- Recognize displays of resourcefulness, critical thinking, and initiative.

Proactive Performance Management

- Conduct 30/60/90 reviews to provide early feedback.
- Refer to job description as resources during performance talks.
- Address skill gaps through training and stretch assignments.
- Have candid conversations to address misalignment early.

NEW EMPLOYEE MILESTONE TRACKER

This milestone tracker empowers you to proactively monitor and manage your new hire's performance, development, and acclimation during the onboarding period. Tracking key objectives they should achieve in their first 30, 60, and 90 days allows you to ensure they are on pace and adequately ramping up. It also facilitates timely feedback, course-correction, and additional support if any milestones are missed.





Charting Your Course: A 30–60–90 Day Plan

Instructions: Let's map out the first 90 days to set your new employee up for success! Visit [the HR Website](#) to get a few overview of what a 30–60–90 day plan entails and use this template to outline key objectives and milestones at each stage.

Consider milestones such as:

- Ramping up on key systems/tools
- Building relationships, becoming fully integrated on the team
- Mastering responsibilities or driving a specific initiatives forward

30 days

What are the learning objectives expectations?
What are the goals to hit in the first month?

60 Days

What are ongoing and new objectives? Review successes, strengths and improvement opportunities

90 Days

Review accomplishments and specific strategies or activities to prepare for future projects, more complex assignments, and ongoing development.

1:1 PULSE CHECK

We want onboarding to be well-thought out and intentional. This is why checking in with new employees after their initial onboarding period is so valuable. Take some time to sit down with new hires and do the following:

1 JOB DESCRIPTION REVIEW

- Review job description and discuss which responsibilities the new hire is excelling at versus finding challenging.
- Identify any needs for additional training or support.

2 FOSTER PSYCHOLOGICAL SAFETY

Create psychological safety by reassuring the employee you welcome candid feedback and want to hear their perspective on what can improve.

3 UNCOVER BLINDSPOTS

Ask open-ended questions to uncover any roadblocks, frustrations, or blind spots the new hire may be facing related to processes, workflows, systems, etc.

4 CO-CREATE BEST PRACTICES

Discuss working/communication styles to determine where you can adapt to better align. Continuously touch base on best practices for working together.

Questions for consideration:

- How do you feel about our onboarding progress to date?
- You seem worried about this, what are some ways we can approach moving forward?
- I've observed that you do this very well, what is your impression of how it's going?





BUDDY BASICS: A GUIDE FOR ELEVATING ONBOARDING VIA PEER PARTNERSHIPS

We know how critical those first few weeks and months are for making new hires feel welcomed, supported, and prepared to excel in their roles. Allow your team to help you! Pairing new staff with peer buddies helps them build connections, gain insights from experienced team members, and smoothly transition into your department's culture. Consider the following tips for matching buddies and fostering meaningful partnerships focused on mentoring, socialization, and open communication.

Buddy Selection:

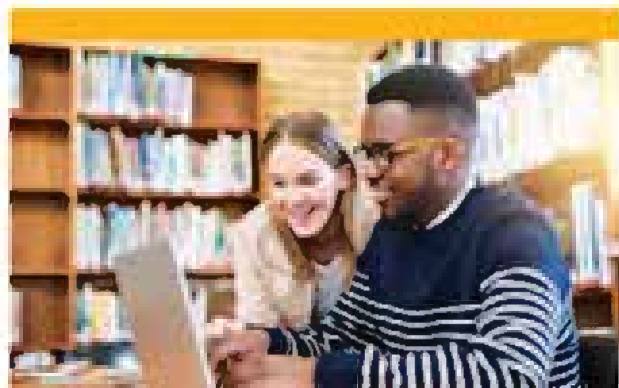
- Ask experienced members of your team to volunteer to be a mentor or “buddy” to a new hire
- Choose buddies who are patient, empathetic, strong communicators and exemplify your department’s values and performance expectations
- Consider the buddy’s current workload and how their expertise aligns with the new hire’s role and onboarding objectives

Building the Relationship:

- Facilitate an introductory meeting for the buddy and new hire to formally meet
- Set expectations for regular check-ins, interactions, and progress reports such as weekly meetings
- Provide guidance on discussion topics and target timelines for topics

Providing Support

- Coach buddies on when to escalate issues to you/or other manager
- Recognize and reward buddies for time invested through verbal appreciation, small perks (if possible and consistent), and spotlighting their work. This motivates both parties’ engagement.
- Get feedback on the buddy system from both parties





WELCOME ABOARD!

THE BUDDY SYSTEM CHECKLIST

These suggested discussion prompts aim to provide helpful guidance – but don't feel tied to checking every box! Every buddy partnership is unique, so feel free to be flexible and focus on what works best for your conversations. Use these prompts as a jumping off point and then take the lead from your new buddy's needs.

The First Meeting

- ☒ **Get to Know Each Other**
What is your background, experience, interests and goals at CUIMC?
- ☒ **Share your Experience**
What tips and tricks helped you succeed? What are some current challenges?
- ☒ **Explain the Team**
How is the team structured? Who is who? Who are some key contacts that everyone must know? What are the department's values and norms.
- ☒ **Review Position and Responsibilities**
How do the buddies work together? What are some processes and projects they will familiarize themselves with
- ☒ **Set Meetings/ Check-Ins and Make Space for Questions**
Establish how often buddies should meet and answer any pressing questions.

Ongoing Meetings

- ☒ **Review Last Session**
Provide time for any new questions, discussion on progress made, and identifying any roadblocks
- ☒ **Coaching Moments**
Make sure to impart any tips for presenting work, communication styles or how to handle certain situations. Feedback is always valuable.
- ☒ **Success Highlights**
Make time to celebrate any successes or learning moments.
- ☒ **Brainstorm Moments**
Are there any ideas for innovation or process improvements for the department? New hires often come with great ideas!
- ☒ **Working Together**
Are there any upcoming meetings or events you can attend together? Prep for them in advance or provide context/ extend the invitation to attend.

FURTHER READING



- [AIHR: Buddy System at Work:](#)
- [Harvard Business Review: Every New Employee Needs an Onboarding "Buddy"](#)



ASK AWAY!

SAMPLE QUESTIONS FOR NEW HIRE PULSE CHECKS

Having intentional conversations during pulse checks allows you to support new hires, uncover blindspots, and co-create solutions together. Use these sample scripts to guide your discussion:

- **How are you feeling about your new role so far?**
 - ❖ What aspects are going well?
 - ❖ Where do you need more support?
- **Let's review your job description together.**
 - ❖ Which responsibilities are you excelling at? Which feel most challenging?
- **I want us to regularly practice sharing candid feedback.**
 - ❖ Please know that I welcome your perspective on how we can improve your onboarding experience - what are your thoughts?
 - ❖ What roadblocks or frustrations, if any, have you encountered related to our systems, processes, or workflows? I'm here to listen.
- **How would you describe your working/communication style?**
Let's discuss how we can best align to empower your success.

Additional Helpful Questions:

- What questions do you have that I can help answer?
- How connected do you feel to the team? What would improve your sense of belonging?
- Which areas of training feel most needed? What support can I provide?
- What are your priorities and goals in the next 3 months? How can I help you achieve them?

While these sample questions serve as helpful prompts, managers should tailor conversations to individual needs; for skills building around sensitive dialogues, see the [Crucial Conversations Website](#).





Additional Resources for New Employees

To help new employees get better acquainted with our campus and key policies, we wanted to provide a few additional helpful resources:



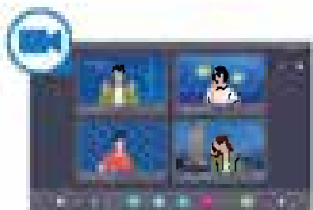
Campus Map

- [Link to CUIMC Campus Map](#)
- Use this map to orient yourself to the layout of our campus and locate your department building(s).



Virtual Campus Tour

- [SABA video tour](#)
- This brief video tour offers insider peeks into our iconic campus sights and buildings. Enjoy exploring!



Approved Virtual Backgrounds

- Represent CUIMC Pride in your virtual meetings by using approved backgrounds from our [Communications Office](#)
- Brand guidelines encourage that official Columbia backgrounds should be used.



MyColumbia

- [My.Columbia](#) contains resources and access to common systems across University departments. It is customized for your job at the University and your UNI access
- Check it out to explore PAC, CUBES, Pay policies, HR Benefits, news/ announcements and much more!



Rapid Access

- ColumbiaDoctors Nurse Practitioner Group offers same-day appointments for CUIMC employees who are sick and need to visit or consult with a primary care provider. To schedule, call 212-326-5705 or scan the QR code.

We hope these resources enrich the onboarding experience!

CREDENTIALING PROVIDERS

The Provider Enrollment Group (PEG) handles credentialing and managed care enrollment. PEG works to demystify credentialing and supports departments and newly hired providers.

For additional information on PEG services and overview of the new hire credentialing process see resources below:

PEG Website

PEG's website offers guidance on credentialing policies, procedures, and standards. It includes contact information for questions on onboarding, recredentialing, enrollment updates, and more.

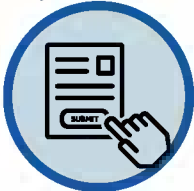
PEG Introduction to Onboarding and Overview

PEG's Credentialing Process Introduction e-learning delivers a step-by-step overview of credentialing in a simple, understandable way. Any staff member or physician can become oriented to the key phases in credentialing.

Performance Review Process & Forms

Performance management process is more than just the annual performance review. The process includes setting clear expectations, and providing specific and ongoing formal and informal feedback. Columbia University provides an online tool called ePerformance to support the performance management process. The ePerformance tool is integrated with People@Columbia (PAC) and can be accessed using your UNI and password.

POLICY



The University's [Performance Management and Appraisal policy](#) requires all Officers and Non-Union Support Staff (NUSS) receive an annual performance review.



Plan

- Set goals aligned to department objectives and competency model
- Establish quantitative and qualitative performance criteria and metrics
- Formalize commitments on expectations and resources in writing



Track

- Provide continuous feedback through regular check-ins
- Connect employee to development opportunities
- Adjust goals if priorities shift



Review

- Evaluate achievement of metrics compared to standards
- Discuss successes, challenges, and future improvements
- Update goals and plan development areas for leveling-up skills

NEW TOOL



- **Performance Management Guide:** [A Job Aid \(for both Managers and Employees\)](#).
- **Video Tutorial:** [How to use the ePerformance System for Managers](#)

COACHING CONVERSATIONS

Coaching conversations are a critical way managers can provide feedback and guidance to help employees develop skills, improve performance, and increase engagement.

Framework for Coaching Conversations:

SET: Set the purpose

- Explain reason for discussion and expected outcome
- Deliver feedback constructively
- Focus on behaviors not the person
- Provide concrete examples
- Communicate positives and areas for improvement

EXPLORE: Ask questions to uncover growth areas

- Listen actively without judgement

DISCUSS: Provide feedback

- Collaborate on SMART development goals
- Agree on resources/training needed
- Set timeline for follow up

WRAP-UP: Conclude positively

- Summarize key points and next steps
- Express confidence and support
- Convey appreciation for engagement

As a leader, there is a delicate balance to coach without **micromanaging** (not giving enough autonomy and ownership) or **underleading** (not providing a clear direction on next steps). In the article entitled "Coaching a Direct Report Who Asks for Your Help," Harvard Business Review (2023) provides some tips on how leaders can most effectively bridge the gap between **goal-setting** and **goal attainment** to help their employees form their own action plan.

EXAMPLE OF MICROMANAGING

Your direct report: "I need to be more consistent with documenting more efficiently, it's an area of growth for me"
You: "That sounds like a smart idea. I'm happy to help. Here's what you should do... [insert your own plan here]. You might want to take some notes."

Consider this approach instead:

"That sounds like a smart idea. I'm happy to help. What do you think could help you be more consistent?"

Deborah Grayson Riegel and Sophie Riegel share these ten questions that leaders can ask others to help them through their action plan:

- Get specific:** "What are you planning to do next?"
- Get positive:** "What's already working for you in this process?"
- Get buy-in:** "What's the opportunity here?"
- Get resourceful:** "What else do you need to move forward?"
- Get realistic:** "What do you need to stop doing to move forward with this?"

EXAMPLE OF UNDERLEADING

Your direct report: I need to be more consistent with documenting more efficiently, it's an area of growth for me - I could use some guidance "
You: "That sounds like a smart idea. I'm happy to help. My door is always open if you need help."

Notice that you are creating a space for others to assess their needs and come up with their own action plan.

- Get collaborative:** "Who else do you need to talk with/work with/align with?"
- Get mental:** "What's your current mindset?"
- Get tracking:** "How will you measure progress?"
- Get prioritizing:** "What step, if done first, will make other steps easier?"
- Get on board:** "How else can I help?"



JOB DESCRIPTION REVIEW

Reviewing job descriptions with employees is a worthwhile exercise that can strengthen performance management. It provides an opportunity to realign on responsibilities and expectations.

Key Benefits:

- Syncs up manager and employee understanding of role responsibilities. This alignment sets clear expectations.
- Allows employee to share any disconnects between actual duties and what's outlined.
- Facilitates discussion about potential growth opportunities within the current role.
- Helps identify strengths to leverage and areas for growth. This enables development.

When to use:



Onboarding

- Review key responsibilities, competencies, and performance measures
- Align on priorities and expectations for the role
- Clarify any questions and ensure mutual understanding

Mid-Year

- Reiterate feedback and formal check-in on strengths/wins thus far
- Discuss areas of challenging
- Reflect on changes and any lingering barriers
- Align on development areas to focus on for rest of year

Annual Review

- Validate that current responsibilities align with existing job description
- Note any divergence of role over the previous year
- Highlight notable accomplishments
- Review competency and skill development
- Set forward-looking goals grounded in job purpose



LEVERAGING JOB DESCRIPTIONS

A good place for managers to start when leveraging job descriptions for development is reviewing the competency model attached to the JD. This outlines the expected proficiency across core areas. For departments that have undergone workforce redesign, competency models serve as key frameworks for growth. If you need a refresher on the model itself or if the competency model is entirely new to you, check out the full overview on the following page.

Guiding Questions when reviewing an individual's Competency Profile:

What level of proficiency is expected at their role?

Identify strengths and growth areas.

Are there competencies where they excel? Recognize these wins.

Pinpoint developmental areas. Which competencies have opportunity for improvement to meet expectations?

Use the model to guide growth goals and learning priorities.



NAVIGATING DIFFICULT CONVERSATIONS

Performance issues can be uncomfortable to address but critically important to a team. It is important to understand that just because a conversation is difficult it is not intended to be criticism. These challenging dialogues can represent breakthrough moments to build trust and reinforce psychological safety.

Approach with Intentionality

- Set the tone - caring, developmental, solution seeking
- Establish shared goals and hope for positive outcomes
- Recognize emotions while redirecting to facts
- Align on rules of engagement to enable openness. For more on rules of engagement check out page 56.

Demonstrate Active Listening:

- Allow others to share their perspectives of the situation or event
- Ask thoughtful questions for understanding
- Paraphrase concerns to show you comprehend them

Find Common Ground

- Uncover shared interests and values and articulate
- Identify points of agreement first before disagreeing
- Build connection on aligned intentions

Commit to Mutual Growth

- Brainstorm solutions side-by-side
- Outline success (behaviors/ actions) and resources available
- Establish follow-ups and accountability



Escalating Issues When Values Are Compromised

While difficult conversations should start from a place of good intent and caring, significant issues require escalation, especially when core CUIMC values like safety, respect, professionalism, and proper workplace conduct are being compromised.

Examples of behaviors that demand escalation:

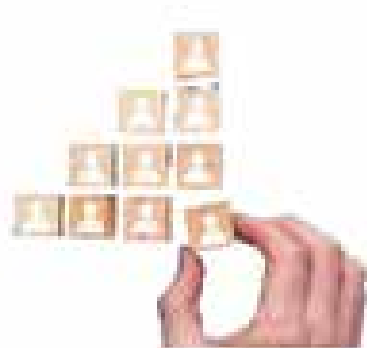
- Discrimination/harassment based on protected characteristics
- Intimidation, bullying, threats, personal attacks
- Unethical directives that violate legal policies
- Statements made promoting prejudice or intolerance
- Refusal to correct behavior after coaching

Reasons to escalate:

- Duty to provide environment free of harm and hostility
- Obligation to report policy breaches immediately
- Responsibility to protect staff physical and emotional safety

How to Escalate:

- 1 **Pause conversation where issue emerges**
- 2 **Affirm zero tolerance for intolerance**
- 3 **Report to HR immediately with documentation**
- 4 **Allow for thorough, objective investigation**



FURTHER READING



- [Center for Creative Leadership: Active Listening](#)
- [Mind Tools: After Action Review](#)
- [International Coaching Federation: 5 Tips for delivering tough feedback](#)

A Guide to Effective Communication

ACTION STEPS: FIVE WAYS TO IMPROVE COMMUNICATION



Position communication as a strategic function.



Define the target.



Make it a group effort.



Integrate variety in messaging styles.



Get an outsider's perspective

The Four Building Blocks of Communication

People

Who is the audience? What do you need to know about them? Whether you're the sender or receiver of the message, it is important to understand the message from the other person's perspective.

Manage perceptions. When deciding what and how to communicate with another person, consider the *Think, Feel, Do* model. What would you want the other person to think, feel and do?



01



02

Message

The message in our communication is more than the words that we speak or write. It includes the nonverbal signals and the tone of voice we use.

What method will you use to send the message? It may be a text, an email, a phone call, a face-to-face conversation or a written report. Is your message meant to inform, persuade? As a sender, allow for the receiver to process your message. Check your message for understanding. Be thoughtful on how you strategize, deliver and evaluate your message.

Context

Consider the location, timing and relationships when thinking about the context of your message. For scheduled conversations, try to anticipate potential barriers and establish initial context. For some communications, it may be optimal to set the stage with an agenda, relevant pre-work, data to prepare, or thought-provoking questions.



03



04

Listening

Give your audience your undivided attention and take time to listen

An effective communicator consists of sharing a clear message but also being a strong listener. Pay close attention to words, tone of voice and body language. Listen attentively and use reaffirming nonverbals and interjections of agreement, when necessary.

TIPS FOR MORE IMPACTFUL COMMUNICATION

Know your audience. Ask yourself: What is the core message and purpose of this conversation? What do I hope to accomplish? Listen actively to confirm understanding and alignment with the goal. Tailor communication to individual styles and preferences for impact.

Knowing Your Audience



Fact-Finder

Requires data and logic in support of argument

Typical requests:

- Data
- Citations
- Summary of evidence



Architect

Needs full transparency around structure, process and method to be used

Typical requests:

- Timelines
- Workplans
- Protocols



Strategist

Connects to overarching goals

Typical requests:

- Statement of purpose
- Alignment plan with existing goals



Diplomat

Preserves and grows relationships

Typical requests:

- Preferences of parties involved

Matching Your Channel to Your Goal



Face-to-Face

Allows us to...

- Control the environment
- Engage in dynamic discussion achieving a mutual understanding
- Convey emotions authentically



Phone

Using the Phone can...

- Catch someone off guard or at a bad time, impairing full attention
- Limit natural conversational cues
- Generate awkward pauses and silences, reducing interpretation to tone of voice



Email

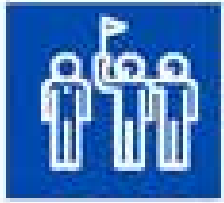
While email can...

- Be delayed in receipt, reducing urgency
- Eliminate opportunity for clarification in real-time, yielding misinterpretation

Podcast Recommendation



In this **Think Fast, Talk Smart: Communication Techniques** episode, Matt Abrahams, lecturer in strategic communication, at Stanford Graduate School of Business discusses three guiding principles for successful communication that include: setting your communication goal, structuring your message and using the art of paraphrasing.



Creating Rules of Engagement

Team Norms

Establishing clear team norms and rules of engagement provides an important foundation for navigating any difficult dialogue or conflict. Rather than relying on implicit, unspoken expectations that can be interpreted differently, proactively aligning on guidelines creates shared understanding.

Making the norms explicit also reduces each person's subjective view that "I'm right/logical/rational and they are being unreasonable." It becomes about holding each other accountable to the standards everyone agreed were fair and productive. This makes de-escalation smoother.

Examples of Rules of Engagement:



Listen fully without interruption. Let others finish expressing their view before responding.



If tensions rise, take a 10 minute break to reset the discussion.



Attack problems not people. Critique ideas, not individuals. Focus on issues.



Find common interests rather than taking positions. We all want what's best.



Follow up respectfully offline if needed. Keep main meetings productive.



Review next steps together. Confirm understanding of any agreements or action plans.

Team Meeting Rules: Creating Order from Chaos

Setting ground rules is an important practice for any team. Establishing rules and norms upfront helps create a culture of psychological safety, respect, and productivity. Teams that take the time to align on guidelines for discussion find that members are more engaged, meetings are more efficient, and collaboration is enhanced.

Below are six suggested ground rules to help your team have more constructive, inclusive meetings.

1 Start on time, end on time
This shows respect for everyone's time and commitment. Be prompt to begin and end when scheduled.

2 Be present
Give your full attention during meetings. Avoid distractions like phones to demonstrate you value your team's contributions.

3 Step up or Step Back
Encourage balanced participation by creating opportunities for all to contribute.

4 Focus on the issue
Address ideas and points, not the individual raising them. Keep critiques constructive.

5 Stay on topic
Keep the discussion focused on the agenda. If new ideas arise, note them in an "idea parking lot" to revisit.

6 Give thanks
Express appreciation for team members' perspectives and efforts.

What meeting rules or norms does your team currently follow? If you don't have guidelines in place, consider agreeing on some as a group. Establishing ground rules sets the stage for better meetings driven by psychological safety, respect, trust, and appreciation. Try out some of the suggestions here or create your own to facilitate productive, engaging dialogue.

Tools for Team Effectiveness

Tools like framing topics and scenario planning enhance team collaboration. Framing topics narrows the focus, adding value to conversations. For example, if a discussion on improving customer service ratings digresses, leaders can reframe back to the issue. Scenario planning considers potential future events, especially uncertain ones. Meeting facilitators can use framing to keep conversations dedicated to the intended focus rather than wandering off topic.

NEW TOOL

Here are four categories that can serve as your guide when framing a conversation and help focus on the right topics:

1**What Is**

The facts and evidence we know about this topic

2**What Should**

The opinions, views, and judgments we need to know more about

3**What If**

Brainstorming possibilities and new ideas regarding the topic

4**What Then**

Where we want to take this topic and set up the next steps

Additional Recourses on How to Frame Topics

- Harvard Business Review | [How to Frame Your Messages for Maximum Impact](#)
- CLIO | [The Power of Collaboration: Powerful Insights From Silicon Valley to Successfully Grow Groups, Strengthen Alliances, and Boost Team Potential](#)



INTENTIONAL LEADERSHIP

Intentional leadership means consciously focusing on culture-building, inclusion, development, and communication. The intentional leader takes a whole-person view towards how they develop, enable, and care for their teams. They lead not just to complete tasks but to elevate people.

MARKS OF AN INTENTIONAL LEADER:

- Sees their role extending beyond task management to developing people
- Actively cultivates a culture where all feel welcomed and heard
- Coaches and mentors to help individuals grow to their full potential
- Encourages constructive debate, creativity, and innovation
- Adapts communication style for understanding across differences
- Seeks to understand diverse perspectives and counter bias
- Leads with transparency, authenticity and high ethical standards

REFLECT ON THE FOLLOWING:



Beyond delivering specific work products, how am I developing people? How much do I encourage debate, creativity and innovation?



Do I make the effort to solicit ideas and input from across the team versus just a few?



What assumptions or biases might be limiting my ability to relate to and understand others?

Rewarding **You:** Our Comprehensive Total Rewards Program

Compensation Structure

At CUIMC, we are committed to compensating our employees competitively and recognizing their invaluable contributions. Our total rewards program includes a full range of pay, benefits, and perks designed to support you and your eligible dependents stay healthy, build long-term financial security for retirement, and meet educational goals. Check out a quick overview below and make sure to reach out to your HR representative for more details.



Pay and Incentives

- CUIMC offers competitive pay based on factors such as role responsibilities, qualifications, and relevant work experience. Employees can access helpful pay resources including calendars, pay statements, and direct deposit forms through the PAC system
- **Please reach out to HR** with any other pay-related questions.



Benefits

- CUIMC provides a comprehensive range of health, disability, retirement, time-off, and other benefits to eligible employees. Details on all our current offerings can be found on the **Columbia University Benefits Enrollment Systems (CUBES) website**
- We offer competitive health and welfare benefits to help you stay well, including medical, dental, and vision insurance.
- Tuition programs to help you pursue educational goals for yourself and your family.
- Well-being benefits support work-life balance through generous paid time off, employee assistance programs, and more.
- Transit Benefits which is a convenient way to pay for commuting expenses with pre-tax dollars, deducted directly from your paycheck each month.



Additional Perks

Beyond our competitive pay and health benefits, CUIMC offers staff additional perks to support their overall quality of life. Employees have access to exclusive corporate discounts on:

- Entertainment options
- Tech devices
- Travel deals
- Gym memberships
- And much more!

Check them out **here**

EMPLOYEE APPRECIATION

CUIMC encourages the recognition of excellence in the workplace. We believe rewards should be given promptly, frequently, and consistently to ensure the practice is meaningful. They should also be personal to the recipient and visible when possible. In addition, we feel continuous effort should be made to reward and recognize remote employees to keep them engaged.

Models of rewards and recognition may include:

Staff birthday celebrations	Local gift cards
Approved time off	E-Cards or hand-written thank you's
Employee suggestion awards	Appreciation box
Team awards	On-the-spot recognition
Bulletin board recognition	Increased responsibility/visibility

Other Ways to Build a Culture of Appreciation:

- Recognize wins and milestones publicly
- Cultivate peer-to-peer appreciation
- Incorporate recognition in reviews and 1:1s
- Celebrate work anniversaries and achievements
- Ask employees how they want to be recognized
- Promote job advancement/stretch assignment

Resources When Considering How to Recognize Team Members:

Email Recognition

Thank You Letters

Remote Employees

2021 Recognition Calendar

2024 Healthcare Recognition Calendar



Essential Healthcare Recognition Days 2024

National Healthcareer Association

Throughout the year, specific days, weeks, and months are set aside to raise awareness about crucial health topics and professions. Below is a list of some of these dates. Mark them on your calendar to help disseminate information that matter to you, or express gratitude to healthcare professionals like yourself!

Day	Group, Culture or Cause Recognized
January	Blood Donor Month
January 25	National IV Nurse Day
February	American Heart Month
February 4	World Cancer Day
March 11 - 17	Healthcare HR Week
March 30	National Doctors' Day
April 7	World Health Day
April 23 - 27	Patient Experience Week
May	Mental Health Month
May 6 - 12	National Nurses Week
June 10 - 17	National Nursing Assistant Week
June 11 - 17	Men's Health Week
July	UV Safety Month
	National Minority Mental Health Awareness Month
August 12 - 18	Health Center Week
August 23	Health Unit Coordinators Day
September	Childhood Cancer Month
	Healthy Aging Month
October	Breast Cancer Awareness Month
October 15 - 19	Medical Assistants Recognition Week
November	National Family Caregivers Month
November 5 - 9	Allied Health Professionals Week
December 1	World AIDS Day
December 2 - 8	National Hand Washing Awareness Week



Recognition Calendar Template

NEW TOOL



January

Day	Group, Culture or Cause Recognized

February

Day	Group, Culture or Cause Recognized

March

Day	Group, Culture or Cause Recognized

April

Day	Group, Culture or Cause Recognized

May

Day	Group, Culture or Cause Recognized

June

Day	Group, Culture or Cause Recognized

July

Day	Group, Culture or Cause Recognized

August

Day	Group, Culture or Cause Recognized

September

Day	Group, Culture or Cause Recognized

October

Day	Group, Culture or Cause Recognized

November

Day	Group, Culture or Cause Recognized

December

Day	Group, Culture or Cause Recognized



BOOSTING INDIVIDUAL AND TEAM MORALE THROUGH APPRECIATION

According to Harvard Business Review (2022), writing notes of appreciation and focusing on strengths boost individual and team morale and drive development.

Click [here](#) to read more.



1

They help people see their strengths.

Notes of appreciation help our team members see their strengths that they might be unaware of.



WHY NOTES OF APPRECIATION ARE SO IMPACTFUL

3

They signal to people that they matter.

Well-considered notes validate our team members and make them feel valuable to the team. They signal that we appreciate their contributions.

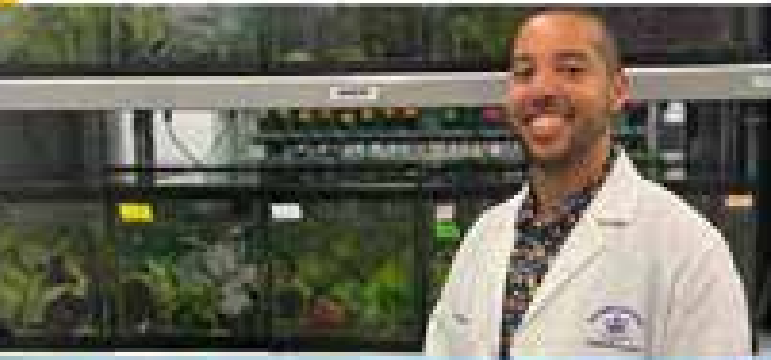
2

They focus our attention on what's working.

Positive notes help us filter what's working and in turn, get more of what's going well.



Employee Spotlight



Employee Spotlight: Columbia Aquatic Manager Turns Childhood Love of Fish into a Career

With Barbet, the service manager of aquatic and reptile life at CUIMC's Institute of Comparative Medicine, overcome early challenges, including loss to a leukemia-related illness, and turned his childhood passion for fish into a career at Columbia. "If I can play a small part using these fish to help enhance the lives of people and maybe to help cure a disease in some indirect way, that's what I want to do," he says. [Read more.](#)

The Employee Spotlight is a recognition program that highlights the diverse stories of exceptional employees. CUIMC employees are doing amazing work throughout the Medical Center, and Employee Spotlights are a way to recognize, congratulate, or thank a CUIMC colleague on a job well done or a special occasion.

We encourage leaders to consider nominating members of their team as we build a culture of thanks and appreciation for one another. Join us in helping to spotlight a member or members of our community by completing the

[Employee Spotlight Submission Form.](#)

Who is eligible for nomination?

This program is open to all employees. Nominate an employee for any reason, big or small!

What are some examples of areas that you may highlight in your nomination?

Someone who:

- Helps foster a positive and open culture/environment.
- Demonstrates creativity in their day-to-day work and is inspirational to others.
- Demonstrates a special commitment to CUIMC's mission.
- Completed the NYC Marathon for the 6th time.

These are just a few examples and we know that you will come up with many wonderful ways to share why we should spotlight a member of our community!

How often do you recognize nominees?

- Nominations will be evaluated on a quarterly basis.
- Nominations are submitted via an online survey link.
- All nominations will be reviewed by an Employee Recognition Committee and up to 6 employees shall be selected per fiscal quarter.
- Committee members will be rotated on an annual basis.

Four Types of Planning

1 Business Continuity Planning

Anticipating changes in operations and workforce needs to ensure the department can continue serving its purpose.

Reflect: What innovations or responsibilities may emerge that will change required skills or structures?

2 Individual Development Planning

Setting professional development objectives and outlining skills/experiences needed to advance employees' careers.

Reflect: What capabilities can your people build to stay relevant in the organization/ field?

3 Workforce Planning

Forecasting hiring and transition needs to ensure continuity of knowledge and adequate staffing for anticipated projects.

Reflect: Do you have robust documentation and coordination plans for transitions?

4 Hi-Po Development

Providing stretch assignments, visibility, and accelerated learning to high potential individuals identified as rising stars.

Reflect: Are you intentional about talent mobility and developing your bench strength?

STAY INTERVIEWS

Interviews – they're not just for potential candidates and newbies! Often it's assumed that interviews are only valuable during the recruitment process. But structured stay interviews and exploratory questions for existing employees are a powerful and underutilized tool.

Asking key questions can offer insight into employee motivation, and opportunities for improvement. Through ongoing conversations, you'll discover new perspectives to boost engagement and potentially innovative suggestions. Stay curious – this demonstrate genuine care for employees' while also focusing on continuous improvement.

Sample Stay Interview Questions:

- ☒ What makes you excited to come to work each day?
- ☒ When do you feel most connected to our mission and people?
- ☒ What projects or tasks have been most meaningful for you lately?
- ☒ What aspects of your role do you find most rewarding? Most challenging?
- ☒ What opportunities are you interested in exploring in the next 1-3 years?
- ☒ What development or growth areas do you want to focus on next?

CLICK HERE



Investing in Employees: Individual Development Plan

The Individual Development Plan (IDP) worksheet is a valuable supplement to CUIMC's formal **performance management process**. While ePerformance allows for documentation of goals, competencies, and achievements, this IDP provides a framework for employees to reflect on their aspirations, strengths, and growth areas. It facilitates proactive conversations between managers and employees to enable intentional goal-setting around development needs and actionable plans

The IDP facilitates proactive, focused conversations between managers and employees. It puts development in the hands of employees, while outlining how managers can best provide support through coaching, resources, and opportunities. Used consistently over time, it helps track progress against development goals and foster a culture of continuous growth.

Check out the worksheet on the following page!

Remember this worksheet is only a starting point in development planning alongside employees.



Employee Individual Development Plan (IDP)

Employee Name: _____

Position: _____

Manager Name: _____

Development Goals

What are your professional development goals for the next 1-2 years? How will these help advance your career?

Strengths

What strengths would you like to utilize more in your current role or develop further?

Action Plan

What skills or knowledge do you hope to gain to reach your goals? List specific activities that will help you develop the skills and capabilities outlined above. These could include training programs, on-the-job experience, mentoring, reading, certifications etc.

Timeline & Support Needed

What timeline will you commit to for the activities above? How can your manager support you?

Other Development Needs

Are there any constraints or roadblocks you anticipate? What additional support from your manager would help?



Unlocking Potential: Professional Growth at CUIMC

At CUIMC, we encourage every employee to continuously develop themselves personally and professionally. There are endless opportunities to learn new skills, expand your expertise, and advance your career with us.

No matter your background or current role, you can find new challenges and reach your highest potential within the CUIMC community. When our people grow, our organization grows too. A few ways to explore mobility and growth include the following:

Shadowing

Shadowing colleagues is a great way to learn new skills, gain exposure to different roles, and expand your professional network.



Becoming a SME

Serving as a subject matter expert for learning development allows you to share your knowledge, enhance your leadership capabilities, and make a broader impact.



On the following pages, discover official tools to set up a shadowing experience and steps on becoming a subject matter expert.

SHADOWING TOOL

GOLD CIRCLE
Business Group

Employee Name:

Position:

Shadowing Preceptor:

Shadowing Date (s)

Shadowing Preparation Checklist

	Complete	Comments
1. Supervisor Approval: Confirm time allocation, dates, learning objectives, and shadowing activities schedule with direct supervisor.	☐	
2. Questions: Prepare list of questions about shadowing preceptor/ host sub-department in alignment with goals of development activity	☐	
3. Technology: Verify systems access to corresponding programs, as needed for shadowing, and authorized by supervisor	☐	

Shadowing Questions for Consideration:



Keep notes of observations, best practices, and memorable notes for new contacts.

- What do I want to know about the role I'll be shadowing? (Ex: *daily tasks, training experience, and ongoing professional development*)
- What are the primary responsibilities of your direct reports?
- What's a typical day? How do you prepare for a successful week?
- Who do you work with closely and how do you maintain effective communication with these groups?
- What dashboards or metrics do you leverage? How do you utilize them to make decisions?
- What changes do you foresee if the human resources/ healthcare industry?
- What is an interesting fact or general knowledge that you discovered on your own about CUIMC?
- What interesting meetings are on the calendar for the week and how do you prepare?
- How would you describe success at the conclusion of the shadowing timeline?
- Consider sharing with your preceptor a recent project, such as a presentation and inquire about feedback.



MAKE YOUR MARK!

BECOME A PDC SUBJECT MATTER EXPERT (SME)

Subject Matter Experts (SMEs) lend their talents to others via formal learning activities, such as facilitating classes, providing input on materials, or serving on discussion forums. Serving as an SME is an opportunity for knowledgeable and experienced employees to share their knowledge, expand their network, and tactic to recognize their talent.

- SMEs exhibit a high level of expertise in a competency or task within a content area.
- SMEs can engage in a wide range of teaching activities, including serving as facilitator or content advisor for the People Development Center (link and contact below)

SUBJECT MATTER EXPERT (SME) PROFILE



Qualifications

- Advanced knowledge and deep understanding of program topic
- Ability to clearly communicate and explain material to audience
- Passionate about helping others, coaching, and learning.
- Ability to align culture, subject theory concepts, and daily practice



Prerequisites

- 5+ years of experience in subject matter
- 10+ years of experience in subject for senior executive audience level
- Direct Supervisor or VP&S Vice Dean approval



Commitment

- Minimum of two 30-minute prep sessions to review existing learning materials.
- Attend training orientation (estimated one hour)
- Estimated 60-90 minutes of in-person teaching time per program module
- Facilitate or help craft at least one program per quarter
- SMEs share stories of their own experience



Benefits

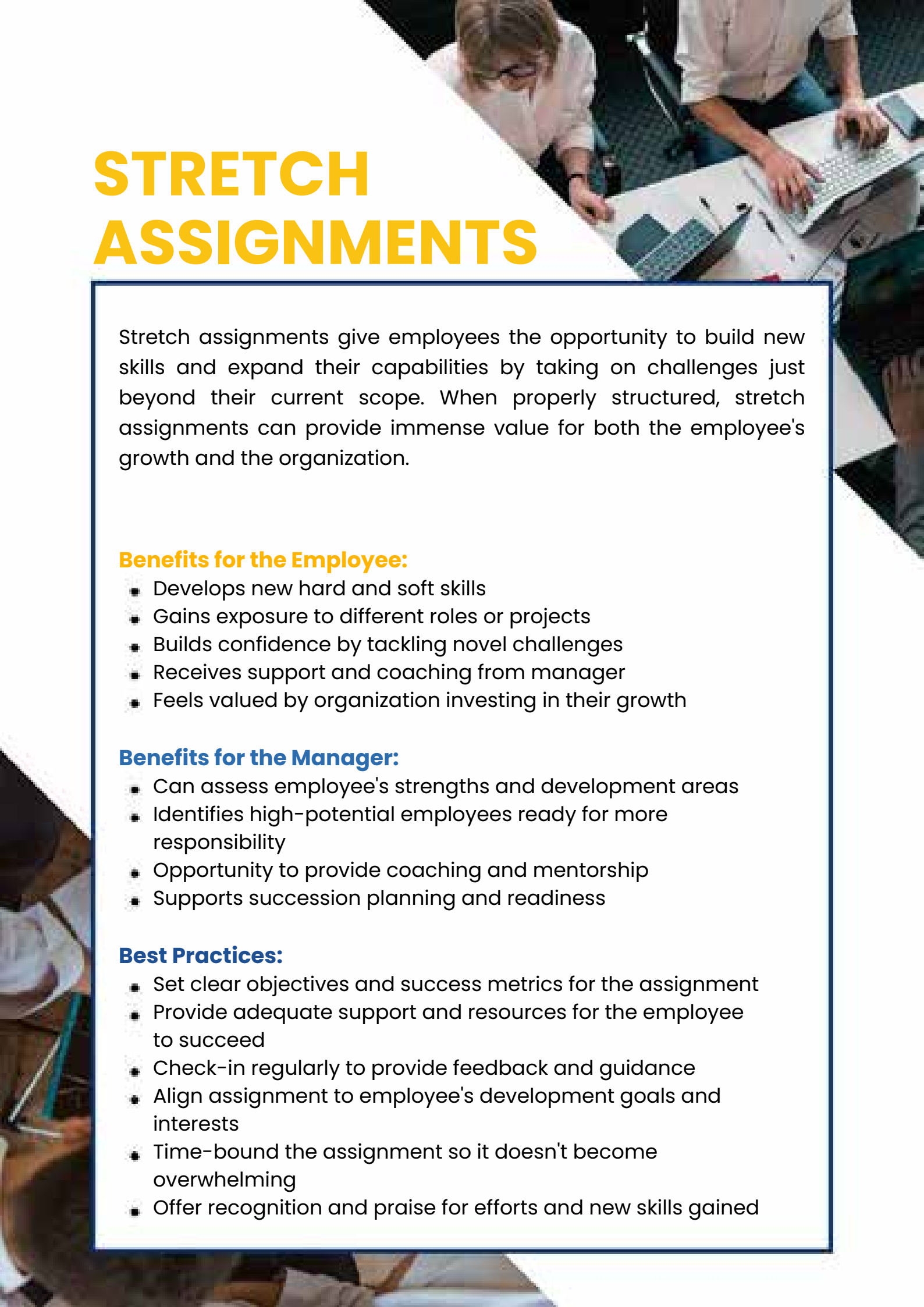
- Networking opportunities with peers and leaders from various departments
- Learning & Development Opportunities to advance competencies
- Recognition and experience to highlight on your profiles, such as LinkedIn
- People Development Center Swag
- Priority registration to highly coveted People Development Center series



People Development Center

[CLICK HERE](#) to submit SME interest form





STRETCH ASSIGNMENTS

Stretch assignments give employees the opportunity to build new skills and expand their capabilities by taking on challenges just beyond their current scope. When properly structured, stretch assignments can provide immense value for both the employee's growth and the organization.

Benefits for the Employee:

- Develops new hard and soft skills
- Gains exposure to different roles or projects
- Builds confidence by tackling novel challenges
- Receives support and coaching from manager
- Feels valued by organization investing in their growth

Benefits for the Manager:

- Can assess employee's strengths and development areas
- Identifies high-potential employees ready for more responsibility
- Opportunity to provide coaching and mentorship
- Supports succession planning and readiness

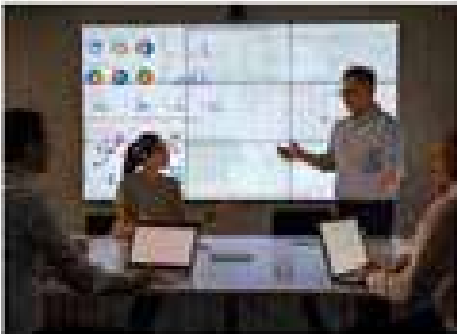
Best Practices:

- Set clear objectives and success metrics for the assignment
- Provide adequate support and resources for the employee to succeed
- Check-in regularly to provide feedback and guidance
- Align assignment to employee's development goals and interests
- Time-bound the assignment so it doesn't become overwhelming
- Offer recognition and praise for efforts and new skills gained

CREATING STRETCH ASSIGNMENTS

Some questions managers can ask themselves when formulating stretch assignments:

- What skills does the employee need to develop for growth?
- What assignments will expand the employee's capabilities?
- What projects utilize the employee's strengths in a new way?
- How can I provide support if the assignment is challenging?
- How will we measure success and learnings from this assignment?
- What does the employee hope to gain from this developmental experience?



Versatile Dimensions of Learning

While ensuring employees success in their current role is important, managers should also explore development opportunities to foster employee growth, prepare for the future of work and build agile teams.

Research shows that when employees feel the organization is investing in them, they are more engaged, motivated, and perform better. Fostering development is a win-win!

Consider a combination of tactics to offer a dynamic experience for teams:



On-the-Job Training

- Shadowing and cross-training to gain new expertise from coworkers
- Prepare staff to explore enrichment activities and stretch assignments



Classroom Learning

- Columbia offers a wide range of education benefits, including Tuition Exemption – [click here](#).
- PDC and CU L&D offers various online and in-person trainings



Coaching & Mentoring

- Informal mentors to offer guidance and help build professional network



SHARPEN YOUR SKILLS:

EMPLOYEE TRAINING PROGRAMS

The links below offer a wealth of resources to help you expand your skills and develop professionally here at CUIMC. Consider them your go-to references for learning more about key tasks, systems, and best practices. Whether you want to dive deeper into specific software, tools for your role, or broader workplace competencies, these links provide helpful tutorials, training materials, and guidance.

[Training Guides and Job Aids](#)

The Human Resources department has created numerous helpful job aids to guide you in using PAC, TalentLink, and navigating other HR functions. Feel free to explore their website and filter the documents to find specific aids that meet your needs - they offer step-by-step instructions to help you successfully manage HR systems and tasks.

[Columbia Enterprise Learning Management | ELM](#)

ELM is Columbia's Enterprise Learning Management system that serves as a centralized platform for online training and signing up for in-person offerings. From required courses like annual HIPAA training to professional development offerings, ELM provides a one-stop-shop to register for and complete all your learning needs, whether mandatory trainings or skills-building offerings.

[LinkedIn Learning](#)

LinkedIn Learning is an online learning platform that provides access to thousands of expert-led courses covering business, technology, and creative skills. CUIMC has partnered with LinkedIn Learning to offer employees on-demand learning content to expand their skills, check it out now!

[HR Training Videos by the Shared Services Team](#)

The Shared Services team has compiled helpful training videos to guide HR employees in completing key tasks and processes. New hires within the HR department are encouraged to view these informational videos to quickly get up to speed on essential systems, policies, and responsibilities related to their roles.





PDC LEARNING & DEVELOPMENT

Core Track: Required standard knowledge across all levels and units –curriculum assignments for the core track will be driven by the learner profile level, ranging from Service Corps individual contributor to Columbia Officer Management Level V.

Proficiency Tracks: There are four proficiency tracks– curriculum recommendations for the proficiency track will be driven by the learner profile level and the scope of work for their role.

CURRICULUM TRACKS



Fundamental and transferable competencies, including leadership, communication, decision-making, project management and process improvement strategies.



Tailored for administrative ambulatory teams, this multi-disciplinary program advances skills in practice operations, leading clinical teams and deliver excellent patient care.



For clinical members in ambulatory teams, programs target health care strategy, coordination of care, safety, compliance, excellence in care delivery and teamwork.



Designed for administrators and roles supporting mission operations, centers around internal client management, strategic planning, and relationship building.



Key patient access themes ranging from providing superb excellent customer service, leading in a patient access setting, and decision-making with call center metrics.



PEOPLE DEVELOPMENT CENTER WEBSITE

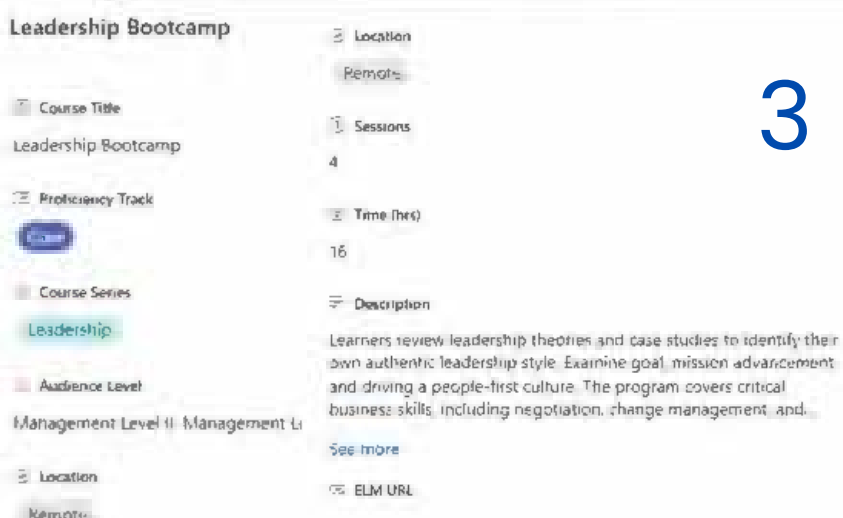
The PDC website empowers users to easily find the right learning and development opportunities. Whether you're a seasoned professional or new to the field, the PDC website makes it simple to navigate our offerings and pinpoint the training that will help you reach your goals. See below for a guide on how to navigate the site and **[CLICK HERE](#)** to start exploring our offerings.



1 Once within the SharePoint site, explore all our offerings! Users will be able to filter L&D opportunities by audience levels.

2 On the right side of the screen, you will see a funnel icon. 

In addition to filtering by audience level, the website also allows users to explore our courses by proficiency track. This makes it easy to map out a personalized learning journey and see how each program builds on the next.



3 When you hover on the "tile" of each offering you will get full details for each course. With direct integration to our Saba learning management system, users can seamlessly register for classes.



HR Learning and Development

Central HR's Learning and Development team provides a robust range of course offerings, certificate programs, and resources. Their catalog includes topics like:

- Leadership
- Communication
- Career development
- And much more

While not tailored specifically to the medical center, these opportunities can supplement your learning Journey, especially the self-paced online courses and resource library.

Their programs do often come at a cost depending on your school/department so please plan accordingly.



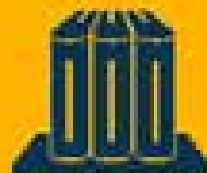
[Course Catalog](#)



[Certificate Programs](#)



Customized Programs



[Resource Library](#)



Job Aid

ASSIGNING EMPLOYEE LEARNING

- 1 Log in to ELM and navigate to "My team" by clicking the three bars on the top left corner.



- 2 On the right side of the screen, under team actions, click "Assign Learning" then "Register"



- 3 Search the catalogue by desired class title
 "Select class" to pick the desired date
 Click the arrow to add the selected class to the learning cart



- 4 You can select multiple classes
 - You have not yet selected learners but will be given the opportunity at the next screen



- 5 View the class(es) selected, dates and confirm registration



Bringing People Together

Socializing

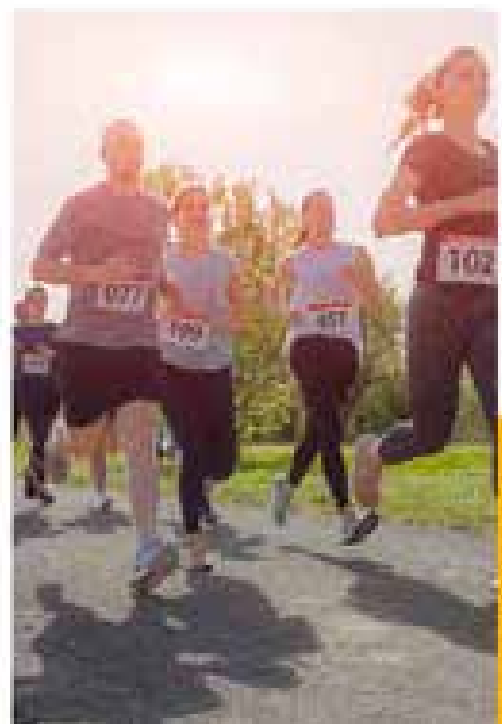
Welcoming employees extends beyond their roles—social integration is key. Encourage them to engage at CUIMC events, connect through ERGs, and participate in development classes. These interactions enrich lives, fuel creativity, and inspire collaboration. Let's guide new hires in forming these vital connections, fostering a tightly-knit CUIMC community. Make sure to check out the [CUIMC Event Page](#) for up-to-date details on opportunities to socialize.



Volunteering

Volunteering is a great way to get to know our vibrant Washington Heights community while giving back. Encourage new employees to explore local groups like food pantries, youth programs, and drives that offer meaningful chances to make an impact. And initiatives like [Velocity](#) give you a way to support Columbia's cancer research and care through cycling. The options for getting involved are endless!

[Click here](#) to explore current volunteer openings that match your interests and heart for service. However you choose to contribute, you'll gain such valuable perspective about the community we serve.





Networking & Mentorship

Finding Informal Mentors

Making personal connections and building relationships with influential colleagues takes time - but it's invaluable for professional growth and navigating organizational culture. Help your new hire find their own informal mentors by highlighting networking events, CUIMC wide events and introducing them to individuals with expertise in their department. Help new hires build rapport and gain the confidence to seek a casual mentor.



VP&S Mentorship Program

The Vagelos College of Physicians and Surgeons' mentoring program pairs junior Officers of Administration (grade 106-108) with senior leader mentors for a 12-month structured development opportunity. To qualify, mentees must have at least 3 years' experience at the College and obtain a letter of recommendation and DA approval. The program provides mentees with guidance on career goals, networking, university protocol, and other professional development priorities through regular meetings and activities with their mentor. The program also enables mentors to contribute to developing future leaders within the College. Overall, the mentoring program aims to create a learning culture that empowers early-career staff through supportive developmental relationships.

To learn more please contact:

vps_mentor_program@cumc.columbia.edu



LET'S WORK TOGETHER

Managers play a critical role in making employees feel welcomed, valued, and aligned from day one and beyond. When we invest time in integrating people, providing resources for growth, recognizing achievements, and supporting transitions, it leads to greater belonging, productivity, and retention. This not only empowers individuals to excel, but strengthens our organization overall. Our collaborative efforts today shape CUIMC's future — so let's lead by uplifting one another along the journey.

