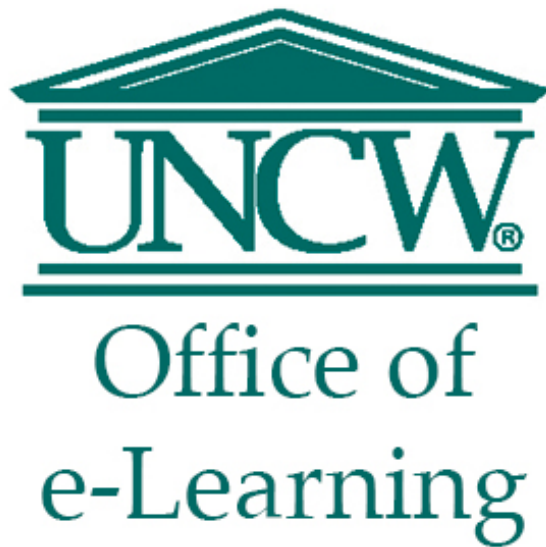


EVALUATION OF THE OFFICE OF E-LEARNING'S ONBOARDING TRAINING PROGRAM AT UNCW



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INTRODUCTION

This evaluation report describes the methods that were used to evaluate the Onboarding Program that is currently being used by the Office of e-Learning (OeL) at the University of North Carolina Wilmington (UNCW). This report includes a description of the background of this program as well as a logic model that highlights resources and activities of the Office of e-Learning. Additionally, the purpose of the evaluation, the key evaluation questions that were investigated, methods and instrumentation, limitations, and the selection sample are discussed in some detail. The primary individuals involved in preparing the report were Nikki Strawn and Stephen Anim, graduate students in the Master of Science in Instructional Technology (MIT) program at UNCW. The facilitator of the project was Colin Taper, Instructional Designer in the OeL and creator of the Onboarding Program.

BACKGROUND/RATIONALE

The Office of eLearning (OeL) in the University of North Carolina at Wilmington (UNCW) primarily performs consulting for faculty during online course design, development, and teaching. OeL is a small yet growing organization led by a director with a staff of instructional designers (currently numbering in three), an e-learning technician, a video technician, and a few graduate assistants. In recent years, OeL has experienced a high turnover rate among its instructional design staff as some employees moved on to other positions within the university or to other institutions. Colin Taper, the primary contact for this project, reported a gap in onboarding during his initial months of work in the previous year. His experience led him to develop the first version of the department's Onboarding Program. He has requested an external evaluation of his materials to get an unbiased measure of its effectiveness.

The evaluation will be used to redesign the Onboarding Program to improve, wherever necessary, the following key indicators of the Onboarding Program's effectiveness:

- Trainees' satisfaction with training.
- Trainee's acclimation to department and campus culture.
- Trainee's self-efficacy in performing job.
- Trainee's practical preparedness in performing the job.
- Trainee's understanding of role and expectations.
- Trainee's organizational commitment.
- OeL's employee turnover rate.

The key deliverables and design elements of the program that will be redesigned may include—in addition to new items—the following:

- Trainer documents: Onboarding Checklist, Required Training Checklist
- Trainee documents: Welcome Packet, First-Week Schedule, Onboarding binder in OneDrive
- Job resources provided to trainee: login credential acquisition, preparedness of computing devices, job aids
- Mentor-trainee shadowing activities

The evaluation covers the initial thirty-day onboarding period in which a new hire in OeL is trained. It examines the new hire's satisfaction with training, feeling of acclimation to the team, understanding of the organization and culture, understanding of the employee's role, and job performance after the first thirty days.

PURPOSE

The purpose of this evaluation was to determine the effectiveness of the Onboarding Program. Some key indicators of effectiveness include: if and how new hires are acclimating to the new role, expectations, policies and culture of the OeL after going through the Onboarding Program, the extent to which new hires feel confident in doing the job well and the extent to which these new hires are transferring their new skills and knowledge. The results will be used to modify the Onboarding Program. The evaluation addressed Kirkpatrick's level one (reactions), level two (learning) and level three (transfer of learning) for training evaluations.

STAKEHOLDER ANALYSIS

STAKEHOLDER ANALYSIS TABLE

Stakeholder Level	Stakeholders	Rationale
Primary Stakeholders	Developer of Onboarding Program	The instructional designer who developed the Onboarding Program is the primary individual interested in the results of the evaluation and in using those results to revise the training program.

	Office of e-Learning as an Organization	OeL employs the trainees and will, in the long term, benefit from the improved employee retention and performance should these factors improve as a result of the changes made in response to the evaluation.
Secondary Stakeholders	Future Employees/Trainees	Future employees will be users of the Onboarding Program. They will benefit from the changes made in response to the evaluation.
	Future Trainers/Mentors	Future trainers will utilize the changes in the Onboarding Program's design and content made in response to the evaluation.
	OeL's Recently Onboarded Staff (Evaluands)	The results of the evaluation will inform the evaluands of the value of their onboarding and of their current satisfaction, acclimation, and job performance.
Tertiary Stakeholders	UNCW Faculty	Faculty will, in the long term, benefit from the improved employee retention and performance should these factors improve as a result of the changes made in response to the evaluation.

EVALUATION MODEL/Framework

For this evaluation we used the Kirkpatrick Model ([Kirkpatrick, 2018](#)), which is a training evaluation model most commonly used for analyzing and evaluating results of training and educational programs. This model uses the following four levels of criteria to determine aptitude:

- Level 1: Reaction - The degree to which participants find the training favorable, engaging and relevant to their jobs
- Level 2: Learning - The degree to which participants acquire the intended knowledge, skills, attitude, confidence and commitment based on their participation in the training
- Level 3: Behavior - The degree to which participants apply what they learned during training when they are back on the job
- Level 4: Results - The degree to which targeted outcomes occur as a result of the training and the support and accountability package

For this evaluation we only used Kirkpatrick Levels 1, 2 and 3. Level 4 was excluded, as the OeL Onboarding Program had only been in place for less than a year and organizational results would have been difficult to measure for such a short time period.

LOGIC MODEL

Underlying Assumptions	Inputs/Resources	Activities	Outputs	Short-Term Outcomes	Long-Term Outcomes
<p>Onboarding Program (training and resources) contributes to employee satisfaction, acclimation to culture, knowledge, and skills.</p> <p>Employee satisfaction and acclimation to culture will influence retention and turnover rates.</p> <p>Onboarding Program (training and resources) can, does, and/or will</p>	<p>Human resources: Instructional designer who developed Onboarding Program, OeL trainees, Trainer (OeL staff that the trainee must shadow)</p> <p>Trainer documents: -Onboarding Checklist -Required Training Checklist</p> <p>Trainee documents: -Welcome Packet -First-Week Schedule</p>	<p>Trainer/mentor sets schedule for Onboarding Program activities according to Onboarding Checklist.</p> <p>Trainer/mentor prepares job resources for trainee (computer, keys, accounts, job aids, etc.).</p> <p>Trainee consumes trainee docs, shadows mentor, and attends training sessions according to</p>	<p>Completion of First Week Schedule</p> <p>Completion of Welcome Packet</p> <p>Meetings and shadowing completion</p> <p>Welcome Lunch</p> <p>Login credentials to necessary accounts</p> <p>Ready-to-go workspace and devices for new hire</p> <p>30-day work plan</p> <p>-New hire name tag & business cards</p>	<p>Trainees' satisfaction with training.</p> <p>Trainee acclimated to department and campus culture.</p> <p>New hires who have high self-efficacy in job performance</p> <p>New hires who fully understand their role and expectations.</p> <p>New hires who feel socially integrated and well acclimated to the OeL.</p>	<p>Higher job satisfaction</p> <p>Organizational commitment</p> <p>Lower turnover</p> <p>Higher performance levels.</p> <p>Career effectiveness</p> <p>Lowered stress</p>

influence employee turnover.	-Onboarding binder in OneDrive	Required Training Checklist. Trainee performs their respective job.		New hires who have knowledge of the OeL culture New hire who understand how they fit within the OeL culture.	
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KEY EVALUATIONS QUESTIONS

The evaluators created a short list of guiding questions the evaluation would seek to address. These key evaluation questions were used in planning, designing, and developing the data collection instruments (surveys, interviews, etc.) and in determining how to report the data.

Key Question	Alignment with Kirkpatrick Model
1. How are participants reacting to the training?	Level 1 (Reaction)
2. To what degree are the intended outcomes of the training being met?	Level 2 (Learning)
3. To what degree is this training impacting participants' job performance?	Level 3 (Behavior)

DATA COLLECTION METHODS

Because we collected data from evaluands after they had already undergone onboarding, we used a retrospective pretest-posttest design for this evaluation. Trainees were asked to rate themselves before and after the Onboarding Program. Research shows that a retrospective pretest-posttest design is used well with the Kirkpatrick Model for training evaluation and is best used for evaluating changes in learning and attitudes (Level 2 in the Kirkpatrick Model). As Lori Wingate, Director of Research at The Evaluation Center at Western Michigan University, writes, "The main benefit of using this method is that it reduces response-shift bias, which occurs when respondents change their frame of reference for answering questions. It is also convenient, more accurate than self-reported data

gathered using traditional pre-post self-assess methods, adaptable to a wide range of contexts, and generally more acceptable to adult learners than traditional testing” ([Wingate, 2016](#)).

The following table outlines the data collection methods used and their alignment with key questions, the selected, evaluation model, and key indicators.

Key Question	Kirkpatrick Level	Indicators	Data Source	Data Collection Method
How are participants reacting to the training?	Level 1 (Reaction)	<ul style="list-style-type: none"> - Trainee’s satisfaction with training. -Trainee’s feeling of being socially integrated and well acclimated to the OeL. 	-New Hires	<ul style="list-style-type: none"> - Retrospective Survey: Use a Likert scale with evaluative statements that reflect the indicators and allow respondents to select how they feel they agree with each statement before and after completing the onboarding process. -Electronic Survey: Ask specific questions that pertain to the specific components of OeL onboarding and their overall reaction in relation to the indicators. - Interview: Ask questions about their feelings and reactions to the OeL’s onboarding training process.
To what degree are the intended short-term outcomes of	Level 2 (Learning)	-Trainee’s self-efficacy in job performance.	-New Hires	- Retrospective Survey: Use a Likert scale with evaluative statements that reflect the indicators and allow

the training being met?		<ul style="list-style-type: none"> - Trainee's understanding of their role and expectations. -Trainee's knowledge of the OeL culture. -Trainee's understanding of how they fit within the OeL culture. 		<p>respondents to select how they feel they agree with each statement before and after completing the onboarding process.</p> <p>-Electronic Survey: Ask specific questions that pertain to the specific components of OeL onboarding and their overall learning in relation to the indicators.</p> <p>- Interview: Ask questions about their learning of job performance, roles, expectations and OeL culture as result of the onboarding training process.</p>
To what degree is this training impacting participants' job performance?	Level 3 (Behavior)	<ul style="list-style-type: none"> -Trainee communicates in a manner that clearly and accurately conveys information, is professional and respectful in tone, is suitable for the target audience, and is concise but sufficient in terms of required detail. -Trainee effectively utilizes awareness of self and audience in verbal and/or written expression to communicate with 	<ul style="list-style-type: none"> -New Hires -Other OeL Employees -Job performance reviews 	<ul style="list-style-type: none"> - Observation: Use an observation checklist to observe new hires on the job after onboarding training to look for indicators. -Review areas of OeL performance reviews on new hires that relate to the indicators. -Interview managers about new hires performance in regards to the indicators since completing onboarding.

		<p>colleagues, clients, supervisory management, and other individuals in the work setting.</p> <p>-Trainee actively listens to determine the most effective way to address customer/colleague needs and concerns. Follows through on commitments, despite time pressures or obstacles, and timely responds to requests.</p> <p>-Trainee maintains a professional and respectful tone and exhibits diplomacy when dealing with frustrated individuals or during sensitive or confrontational situations.</p> <p>-Trainee demonstrates a mastery of the relevant technical or task-specific expertise necessary to perform assigned duties, which may include knowledge of relevant research methods, technology, procedures, policies or other methods, standards or</p>		
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		<p>techniques that are specific to the employee's position and profession.</p> <p>-Trainee demonstrates relevant technical or subject-matter knowledge at a level sufficient to perform the duties of the position in an accurate and professional manner without requiring an unusual degree of oversight or correction.</p> <p>-Trainee produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee's position and profession.</p>		
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SAMPLING

The Office of e-Learning (OeL) is a modest-sized organization that will gradually expand over the years as the university expands its online course offerings and more of the university budget is allocated to serving the faculty of online programs and courses. As of this evaluation, OeL had only two new employees hired since the creation of the Onboarding Program—one instructional technician and one instructional designer. The sample for all data collection methods, therefore, included only two evaluands. One evaluand was hired in November, 2017, five months since their onboarding and their participation in this evaluation. The other evaluand was hired January 22, 2018, which was two months since their onboarding.

INSTRUMENTS

RETROSPECTIVE SURVEY

A retrospective survey was given to the two evaluands to measure the impact of the onboarding training on their learning and behaviors. In a retrospective survey, respondents rate themselves before and after an intervention in a single data collection event. It is useful for assessing individual-level changes in knowledge, skill, attitude, and behavior as one part of an overall evaluation of an intervention. This method fits well with the Kirkpatrick Model for training evaluation (Russ-Eft, 2009).

Our retrospective survey used a Likert scale with evaluative statements that reflect each evaluand's: 1) feeling of being socially integrated and well acclimated to the OeL, 2) self-efficacy in job performance, 3) understanding of their role and expectations, 4) knowledge of the OeL culture, and 5) understanding of how they fit within the OeL culture. The participants were asked to reflect and to select responses that best represent their views and practices *before* and *after* completing the onboard training. We ensured confidentiality with each evaluand as we were aware that as new employees they may have been reluctant to criticize their new employers as well as indicate any shortcomings on their own performance.

An example of the retrospective portion of survey is shown below, and the full survey can be found in Appendix A:

Before OeL Onboarding					Evaluative Statement:	After OeL Onboarding				
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
					I am knowledgeable about of OeL culture.					
					I feel acclimated to the OeL.					
					I understand my roles and expectations in the OeL.					
					I understand how to communicate with instructors.					
					I find onboarding training useful.					

Using a retrospective survey eliminates two problems commonly encountered when using a traditional pre/post survey. First, a retrospective survey ensures there were no incomplete data sets as evaluands completed one survey form. In a pre/post survey format, incomplete data sets are common as either the pre- or the post- is only filled out. Second, a retrospective survey circumvents a “response-shift bias” where participants overestimate their behaviors on the pre-survey and underestimate their behaviors on the post-survey due to a change in frame of reference (Raidl, 2004).

ELECTRONIC SURVEY

In addition to the retrospective survey format, we also developed an electronic survey with both general and specific survey questions regarding their reaction to the onboarding training. The goal of this additional survey was to 1) isolate the characteristics of onboarding training in general and OeL’s onboarding training specifically that affected the evaluand’s reactions 2) provide evaluands an electronic survey that was more anonymous than the paper based retrospective survey 3) give evaluands the opportunity to evaluate specific components of OeL onboarding that the retrospective survey format does not allow.

Some sample items from the electronic survey included the following:

Office of e-Learning Onboarding Survey

4/24/18, 1:30 PM

2. How has your OeL Onboarding compared to other onboarding experiences?

Mark only one oval.

- ☐ I have not had other onboarding experiences to compare.
- ☐ OeL Onboarding was just as effective as others.
- ☐ OeL Onboarding was more effective than others.
- ☐ OeL onboarding was less effective than others.
- ☐ Other: _____

3. Please indicate your level of agreement with following statements about onboarding programs in general. *

Mark only one oval per row.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I feel onboarding is important and necessary.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel onboarding is often a waste of time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I find onboarding to be interesting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I find onboarding to be helpful.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I find onboarding to be overwhelming.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I typically enjoy onboarding when beginning a new job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

A full copy of the electronic survey can be found in Appendix B.

FACE-TO-FACE INTERVIEWS

An interview was conducted with each evaluand to obtain qualitative data on the effectiveness of the Onboarding Program to enhance knowledge gleaned from the survey and identify areas for improvement in the program. The interview questions addressed both the reaction and learning of the evaluands in relation to the key indicators. The evaluands were asked to describe in greater detail their responses to items on the retrospective survey. The interview avoided asking questions in relation to behavior to avoid influencing evaluand behavior during the observations, which would take place after the interview. Interview questions were aligned with the key evaluation questions to ensure validity.

Some sample interview questions included:

- How would you compare your experience of onboarding with OeL to other onboarding experiences?

- Did your onboarding make you feel more or less confident that you could do your job well?
- What are some aspects of OeL's culture that you've learned since onboarding that you wish were made clear earlier?
- What were some specific tasks for which you felt unprepared?

The complete list of interview questions can be found in Appendix C.

Conducting face-to-face interviews provided more in-depth information on the Onboarding Program. Evaluands had the opportunity to share experiences and qualitative descriptions that would otherwise have gone unrepresented (Russ-Eft, 2009). In addition, the interview process allowed the evaluators to collect and record personal impressions regarding the interviewee and the setting, which contributed further to the evaluation team's understanding of the system in which the Onboarding Program operated. Lastly, conducting personal interviews allowed the evaluation team to make a personal connection with the evaluands prior to observations, which may have enhanced the quality and quantity of the data provided and recorded from both the interview and observation.

OBSERVATIONS

Each evaluand was observed while they performed key job tasks. An observation checklist was used to track behavior and measure the evaluand's performance against key indicators. The evaluator making the observation denoted whether or not each behavior was observed and added qualitative comments for each.

Sample key indicators for observation included:

- Evaluand communicates in a manner that clearly and accurately conveys information, is professional and respectful in tone, is suitable for the target audience, and is concise but sufficient in terms of required detail.
- Evaluand actively listens to determine the most effective way to address customer/colleague needs and concerns. Follows through on commitments, despite time pressures or obstacles, and timely responds to requests.
- Evaluand demonstrates a mastery of the relevant technical or task-specific expertise necessary to perform assigned duties, which may include knowledge of relevant research methods, technology, procedures, policies or other methods, standards or techniques that are specific to the employee's position and profession.

Observation is a somewhat obtrusive form of data collection in that it involves the presence of an evaluator in the same environment as the evaluand and, in this case, the evaluand's awareness of their presence. However, observation is a valuable method for gathering

qualitative data on behavior. To ensure alignment with measurement goals, the evaluators used checklist items approved by the instructional designer who created the Onboarding Program. To further enhance validity, observations were conducted in real time from the less-biased perspective of an external evaluator, as opposed to self-reporting by the evaluand or reporting by a co-worker or supervisor.

TIMELINE AND BUDGET

TIMELINE

Task	Duration	Start	Finish
Evaluation	53 days	2/15/18	4/27/18
Project Management	7 days	2/15/18	2/22/18
Team planning	3 days	2/15/18	2/18/18
Meet with client	1 day	2/20/18	2/20/18
Team debriefing	1 day	2/22/18	2/22/18
Phase 1	6 days	2/26/18	3/5/18
Develop Rationale & Purpose	5 days	2/26/18	3/4/18
Revisions	1 day	3/5/18	3/5/18
Phase 2	9 days	3/10/18	3/19/18
Stakeholder Analysis	2 days	3/10/18	3/12/18
Develop Evaluation Model/ Framework	2 days	3/12/18	3/14/18
Develop Logic Model	2 days	3/14/18	3/16/18
Develop Key Questions	2 days	3/16/18	3/18/18
Revisions	1 day	3/19/18	3/19/18
Phase 3	8 days	3/25/18	4/2/18
Plan Data Collection Methods	2 days	3/25/18	3/27/18
Plan Sampling	1 day	3/27/18	3/27/18
Review Extant Data	4 days	3/28/18	4/1/18
Revisions	1 day	4/2/18	4/2/18

Phase 4	23 days	4/2/18	4/25/18
Develop Surveys and Interview Questions	5 days	4/2/18	4/7/18
Develop Observation Plan	2 days	4/7/18	4/9/18
Conduct Surveys	1 day	4/9/18	4/10/18
Conduct Interviews	2 days	4/10/18	4/12/18
Perform Observations	1 day	4/13/18	4/13/18
Analyze Results	5 days	4/14/18	4/19/18
Report Findings	1 day	4/22/18	4/22/18
Revisions/Prepare Final Report	5 days	4/22/18	4/27/18
Submit Final Report	1 day	4/27/18	4/27/18

BUDGET

Item	Rate	Hours/Quantity	Cost
Evaluators	\$60 per hour	80 (x2)	\$9,600
Evaluands	\$33 per hour	3 (x2)	\$198
Project Sponsor	\$33 per hour	4	\$132
OeL Director	\$40 per hour	1	\$40
Documents ¹	\$0		
Travel ²	\$0		
Total			\$9,970

1: Documents are provided electronically in print-friendly formats, incurring no cost.

2: The evaluators worked at the institution and did not incur any additional travel costs.

RESULTS

DATA REPORTING APPROACH

The evaluation consisted of only two evaluands, which means that each could be readily identified if the data were reported in case studies or another detailed form. In addition, as explained in the limitations section, one evaluand completed the Retrospective Survey and one evaluand completed the Electronic Survey. In order to protect the identities of the evaluands, the evaluation team decided not to identify evaluands by name or number in any findings sections and instead just use the term “Evaluand.” Due to the different job positions of the evaluands, observation findings were reported individually as Observation 1 and Observation 2 without identifying evaluand by name or number as well.

Categories used for coding the data were developed in accordance with patterns identified in the evaluands’ responses (or from the onboarding creator’s primary concerns: onboarding, acclimation, culture, and job role).

KEY QUESTION 1 FINDINGS

Key Question: How are participants reacting to the training?

Indicators: Trainee’s satisfaction with training and feeling of being socially integrated and well acclimated to OeL.

Data Collection Method	Findings
Retrospective Survey (n=1)	<ul style="list-style-type: none"> • Evaluand reported a shift of neutral to strongly agree in feeling welcome and part of the team as result of onboarding. • Evaluand reported a shift of neutral to strongly agree in establishing good relationships with people that are key to their role as result of onboarding. • Evaluand reported a shift of strongly disagree to neutral in knowing where to go to access important information needed for their role as a result of onboarding. • Evaluand reported a shift of disagree to strongly agree in feeling confident in using the systems needed in their role as a result of onboarding.
Electronic Survey (n=1)	<ul style="list-style-type: none"> • Evaluand strongly agreed the onboarding training was informative, encouraged interaction with OeL colleagues, and helped them feel more at ease with OeL colleagues, however,

	<p>disagreed that completing OeL onboarding training led to feelings of social integration and lowered stress.</p> <ul style="list-style-type: none"> • Evaluand also disagreed that the onboarding training was well organized and helped them understand OeL policies and procedures. • Evaluand rated the Welcome phone call, Welcome pack materials and shadowing process as excellent. • Evaluand rated the first day Welcome event, first week schedule, list of required new hire trainings as above average. • Evaluand rated the first 30-day work plan as average. • Evaluand rated overall satisfaction, overall acclimation, overall impact on job performance and overall effectiveness as average.
Interviews	<ul style="list-style-type: none"> • Half of the sample found OeL's onboarding more effective than previous experiences while the other found it less effective. • One evaluand felt more socially acclimated to the team early on, while the other took longer to feel socially acclimated. A notable difference in their experience was that the former shared an office with another OeL team member while the latter's office was isolated from other team members. • Both evaluands expressed an understanding of the organization's existing staff being recently hired and expressed a positive outlook about the organization's plans for the future. • Both evaluands expressed dissatisfaction with the onboarding binder in the OneDrive. Both reported not officially receiving an "onboarding binder" and reported the OeL OneDrive was not adequately organized. Both expressed that the OneDrive had a wealth of knowledge but was difficult to tap into this knowledge due to the lack of organization and management of the information in the OneDrive. • Both evaluands expressed high levels of satisfaction with the shadowing process, however, both also mentioned the need for guidance on what specifics to be aware of during shadowing of the different roles.

KEY QUESTION 2 FINDINGS

Key Question: To what degree are the intended outcomes of the training being met?

Indicators: Trainee's: 1) self-efficacy in job performance, 2) understanding of their role and expectations, 3) knowledge of OeL culture, and 4) understanding of how they fit within OeL culture.

Data Collection Method	Findings
Retrospective Survey (n=1)	<ul style="list-style-type: none"> • Evaluand reported a shift of strongly disagree to agree in being knowledgeable of OeL culture as a result of onboarding. • Evaluand reported a shift of disagree to strongly agree in understanding the goals of OeL as a result of onboarding. • Evaluand reported a shift of disagree to strongly agree in understanding the how their role contributes to the OeL goals as a result of onboarding. • Evaluand reported a shift of disagree to strongly agree in knowing the organizational values of OeL as a result of onboarding. • Evaluand reported a shift of disagree to agree in knowing what to do to have a successful career in OeL as a result of onboarding. • Evaluand reported a shift of disagree to strongly agree in understanding how to communicate with faculty as result of onboarding. • Evaluand reported no shift and disagreed in their ability to confidently define their own role with OeL before and after onboarding.
Electronic Survey (n=1)	<ul style="list-style-type: none"> • Evaluands agree the training helped them feel more prepared on the job. • Evaluands disagree that they could define their own role with OeL.
Interviews	<ul style="list-style-type: none"> • Both evaluands are still unclear on their job roles and expectations. • The onboarding did not lead to an increase in self-efficacy. • Evaluands expressed that it took a longer period than the onboarding program to develop an understanding of OeL's organizational culture. • Evaluands felt they were without adequate resources to perform their jobs within the first few weeks. • Evaluands expressed that learning the team dynamics was a challenge and took longer than the onboarding program to

	<p>develop an understanding of each team member's role, proficiency, skill-set, and areas of expertise. Both evaluands expressed they wish they would have known these individual qualities earlier in the process to help gain a better understanding of who to go to for what as well as gain an understanding of how their qualifications compare to the other team members.</p> <ul style="list-style-type: none"> • Evaluands expressed that learning the “big picture” of how and why OeL operates was a challenge because of the lack of formal and documented procedures and processes. They had to learn through experience why things were done certain ways instead of these practices being explicitly documented for them.
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KEY QUESTION 3 FINDINGS

Key Question: To what degree is this training impacting participants job performance?

Indicators: Trainee exhibits relevant technical and soft skills.

Data Collection Method	Findings
Observation 1	<ul style="list-style-type: none"> • Evaluand demonstrated clear and accurate communication skills. • Evaluand's tone was casual/informal but friendly, helpful, and empathetic. • Evaluand matched their terminology and description of tools and design strategies to match faculty member's level of understanding and personality. • Evaluand demonstrated exceptional judicious sharing of knowledge skills and gave instructor only the amount of information the instructor needed to know at the time. • Evaluand displayed active listening skills through smiling, eye contact, posture, mirroring, and jotting down important concerns faculty mentioned. • Prior to start of meeting, Evaluand expressed how they planned to communicate with this faculty member giving her past experiences and awareness of faculty member's personality and “learning style.” • Evaluand maintained a patient, encouraging and positive attitude when faculty member expressed frustration and overwhelming feelings about future LMS change.

	<ul style="list-style-type: none"> • Evaluand was able to walk faculty member through several technical and task specific processes related to LMS tool and instructional design strategies. • Evaluand required no oversight in any topic or task that arose during the consultation meeting. • Evaluand provided thorough and accurate documentation of the faculty consultation meeting in OeL consultation software tool.
Observation 2	<ul style="list-style-type: none"> • Evaluand worked patiently to make sure instructor understood what was being explained. • Evaluand's tone was casual/informal but friendly, helpful, and empathetic. • Evaluand matched their terminology and description of objects to the level of a layman. • Evaluand gave instructor only the amount of information the instructor needed to know at the time. • Evaluand responded to instructor email within minutes of receiving it. • Evaluand maintained a patient attitude when dealing with confused and frantic instructor. • Evaluand domain knowledge was comprehensive enough to predict the cause and nature of the instructor's issue. • Evaluand helped instructor all the way through in a matter of minutes without the need for supervision or the intervention of any other party.

CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

- The current deficits in the onboarding program appear to be products of the urgency and the informal process under which it was originally developed, which was in turn a product of the organization being understaffed and its roles not yet defined.
- The onboarding period itself did not feel clearly defined to the evaluands. This was possibly due to the lack of a milestone event denoting the end of onboarding (e.g. the new hire's mentor or the OeL director touching base with the new hire).
- By the end of onboarding, the evaluands did not feel they fully understood the job expectations and roles within the organization. This is despite the fact that job

descriptions were developed for both the instructional designer and instructional technician positions. The evaluation revealed that Human Resources did not include the full job descriptions in the job postings and the director of OeL was not aware of this until very recently. The job expectations and roles within OeL were also not described to the new hires during onboarding. These were the likely causes of the evaluands not understanding their jobs and roles within OeL.

- OeL's onboarding program was reported to be notably more organized than that of a company that was dismissive of its employees but significantly less organized than a well-structured company.
- Evaluands reported a strong desire for more resources to better understand their jobs, the organization, and the culture and to more quickly adapt to their assigned tasks. The evaluation revealed that some of these resources were in place, but their availability was not made known to the new hires.
- Acclimation to OeL's culture was inconsistent. This was likely caused by the necessary distribution of OeL employees across campus with new hires potentially isolated from coworkers, who can provide ready access to cultural knowledge as well as regular interaction to enhance a sense of belonging.
- Observations failed to prove that deficits in onboarding translated to a noticeable deficit in job performance in the areas of technical and soft skills. However, due to observation limitations it is inconclusive as to whether the evaluands lack of deficiencies is exclusively due to onboarding. (See limitations below for more details.)

RECOMMENDATIONS

The following is a list of recommended changes to the onboarding program that are intended to address issues identified during data collection:

- Provide new hires with:
 - a guide for all OeL job descriptions, roles, and expectations.
 - access to documentation of job-specific processes and workflows.
 - a list of performance-support resources and tactics needed or recommended during typical projects and tasks.
 - a guide for department and campus terminology—commonly used terms among faculty, learning management system (Blackboard and Canvas) terms, online course design contract terminology, etc..
 - TAC overview and any other documentation that provides information about technology support and the tools used within OeL.
 - descriptions and case studies for each department OeL serves.

- description and skills profile for each OeL staff member.
- a guide for what to observe during shadowing process.
- a well-formed 30-day work plan. A written onboarding document, or road map, that outlines the specific timeline, goals, responsibilities and support available to new hires that spells out what they should do and what assistance they can expect. The plan should be co-written with new hire and communicated to all members of OeL, consistently applied and tracked over time.
- For the first 30 days, have new hire share an office with another OeL staff member who shares the same job tasks or serves the same faculty members to provide ready access to an experienced employee and to support social integration.
- Use milestones, such as 30, 60, 90 and 120 days on the job—and up to one year post-OeL entry—to check in on employee progress.
- Assign a mentor to new hires. (One study found that new employees with mentors became more knowledgeable about their new organizations than new employees who did not have mentors. Researchers have also found that new employees are more likely to have learned and internalized the key values of their organization’s culture if they had spent time with a mentor.)
- Create outlines for what superiors (the OeL Director and the Associate Vice Chancellor of Distance Education) should review with the new hire during one-on-one meetings. These meetings should occur during the first week of onboarding.

IMPLEMENTATION

The following is a list of recommended strategies for implementation:

- Perform a job task analysis for each role in OeL for which a new hire is anticipated within the next five years.
- Create an organized means of assigning projects and disseminating project details to OeL staff. This may involve use of a project management tool.
- Conduct interviews with OeL instructional designers and instructional technician to inform case studies.
- Enhance the organization of the information systems used by OeL (i.e. OneDrive) to support new hire access to key information on organization operations, management, and decision making.
- Utilize more technology-based tools to facilitate the onboarding process.
- Perform a cultural audit of OeL. This is an analysis procedure that focuses on workers, work processes, and the workplace and answers the question: “How do we think about things or do things in our organization?”

- Use Realistic Job Preview (RJP) strategies to create a structured observation guide for new hires.
- Develop a procedure for creating a 30-day work plan—quickly identifying current and upcoming projects that a new hire can handle, choosing projects that are valuable learning experiences for the new hire, choosing a manageable workload, accounting for other onboarding activities, etc..
- Create OeL Mentoring Program guide that outlines the mentoring process, gives guidelines for a mentoring relationship, and provides suggested mentoring activities.

LIMITATIONS

- The sample was limited to only two evaluands. Additionally, there was only one evaluand for each of the two job positions examined.
- For the duration of the evaluation, there were no new evaluands (i.e. new hires) to conduct a pretest and posttest with. The evaluators had to gather retrospective data from the recently onboarded hires through surveys and interviews.
- The evaluands were onboarded months apart and so were not a part of the same cohort.
- Due to the evaluands' time constraints and workloads and the evaluators' desire to avoid alienating the evaluands by being too assertive, survey data was incomplete. Each of the two evaluands completed one of the two surveys, and neither completed both.
- There were no departmental or job specific "New Employee Performance Evaluation" criteria identified by OeL to be used as key indicators for the observations. Evaluators modified general employee evaluation standards used by the University as key indicators for evaluation. The key indicators were neither OeL specific, job specific nor new employee specific thus leading to general professional standards for proficiency that the evaluands may have already acquired in previous professional experiences.
- Both evaluands were well beyond the 30-day new hire mark when observations were completed therefore the performance observed is not exclusively indicative of what was acquired in onboarding but instead of what was acquired in onboarding plus experience and skills gained from being on the job for X amount of time.

APPENDIX A: RETROSPECTIVE PRETEST AND POSTTEST SURVEY ITEMS

Before OeL Onboarding

After OeL Onboarding

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Evaluative Statements about Acclimation	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
					I feel welcome and part of the team.					
					I have the tools needed to do my job well.					
					I know where to go to access important information needed for my role.					
					I know how to seek clarification from or provide updates to supervisory management and/or the team on the status of assigned workload.					
					I have established good relationships with people that are key to my role.					
					I have had a good quality one-on-one meeting with my supervisor.					
					I'm confident in using the systems needed in my role.					

Before OeL Onboarding

After OeL Onboarding

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Evaluative Statements about OeL Culture	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
					I am knowledgeable of OeL culture.					
					I feel this is a great organization for me.					
					I understand the goals of OeL.					
					I understand how my role contributes to the organizational goals of OeL.					
					I know what the organizational values of OeL are.					
					The organizational values of OeL align well with my own values.					
					I have a good idea about what I can do to have a successful career here.					

Before OeL Onboarding**After OeL Onboarding**

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Evaluative Statements about Job Role	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
					I could, with complete confidence, define my own role with OeL.					
					I understand how to communicate with faculty.					
					I feel competent in my ability to perform the duties required of my job position in OeL.					
					I have a clear understanding of my objectives and tasks and what I am expected to accomplish.					
					I could, with complete confidence, complete all processes applicable to my role.					
					I feel this a great role for me.					

APPENDIX B: ELECTRONIC SURVEY ITEMS

Office of e-Learning Onboarding Survey

4/24/18, 1:30 PM

Office of e-Learning Onboarding Survey

* Required

New hire feedback is an important process within any organization. It is an opportunity for new hires to share views and opinions which will help improve the quality and standards of the organization's provisions in the future. This survey is anonymous and as a result no-one will be able to trace your comments back to you. Once completed, the results of these surveys will be analyzed by an external evaluation team and an overview compiled that will be discussed in a final evaluation report. No specific survey answers will be shared with the Office of e-Learning.

Section 1 of 5: General Onboarding Experience

In this section we will collect information on your opinions and experiences with onboarding in general. In subsequent sections, you will be able to give input that is specific to your OeL onboarding experience.

1. **Other than OeL Onboarding, how many other formal onboarding experiences have you completed with other employers? ***

Mark only one oval.

- ☐ None, The OeL Onboarding experience was my first.
- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4 or more
- ☐ Other: _____

2. How has your OeL Onboarding compared to other onboarding experiences?*Mark only one oval.*

- ☐ I have not had other onboarding experiences to compare.
- ☐ OeL Onboarding was just as effective as others.
- ☐ OeL Onboarding was more effective than others.
- ☐ OeL onboarding was less effective than others.
- ☐ Other: _____

3. Please indicate your level of agreement with following statements about onboarding programs in general. **Mark only one oval per row.*

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I feel onboarding is important and necessary.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel onboarding is often a waste of time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I find onboarding to be interesting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I find onboarding to be helpful.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I find onboarding to be overwhelming.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I typically enjoy onboarding when beginning a new job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. Any additional comments or opinions about onboarding in general: *

Section 2 of 5: My OeL Onboarding Experience

Please indicate your level of agreement with following statements about your personal experience with onboarding at OeL.

5. My OeL onboarding experience... **Mark only one oval per row.*

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Not applicable
was enjoyable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
was informative.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
was effectively designed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
was well organized.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
helped me to feel more prepared on the job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
helped me to understand the organizational structure of OeL.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
helped me to understand the organizational structure of Distance Education.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
helped me understand OeL's place within UNCW.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
helped me to feel more oriented to campus.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
encouraged interaction with my OeL colleagues.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
helped me to feel more at ease with my OeL colleagues.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
encouraged interaction with UNCW faculty.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
helped me to feel more at ease with UNCW faculty.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
helped me to understand OeL policies and procedures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
helped me to understand OeL expectations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
helped inform me of ongoing/planned OeL projects.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 3 of 5: OeL Components of Onboarding

In this section, we ask for your feedback on specific components of OeL's onboarding process.

6. Rate the following components of your OeL onboarding experience **Mark only one oval per row.*

	Very Poor	Below Average	Average	Above Average	Excellent	Did not receive
Welcome phone call	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
First day Welcome Event	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Welcome packet materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
First week schedule	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
First 30 day work plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
List of required new hire trainings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Onboarding Binder in OneDrive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shadowing process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. Please comment about the quality and/or usefulness of any of the above listed components: *

Section 4 of 5: Reactions

Please indicate your level of agreement with the following statements:

8. Completing OeL onboarding training led to feelings of... **Mark only one oval per row.*

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Not applicable
higher self-efficacy in performing job requirements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
social integration into the OeL.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
lowered stress.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
higher job satisfaction.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
better understanding OeL culture.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 5 of 5: Overall

Please give your overall input on OeL's onboarding program.

9. Rate the following characteristics of OeL's Onboarding experience: **Mark only one oval per row.*

	Very Poor	Below Average	Average	Above Average	Excellent
Overall satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall acclimation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall impact on job performance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall effectiveness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

10. Please list the best feature/part of OeL's onboarding experience. *

11. Please list any features/parts of OeL's onboarding experience that can be improved. *

12. Please provide any additional comments or suggestions regarding OeL's onboarding process. *

APPENDIX C: EVALUAND INTERVIEW QUESTIONS

ONBOARDING

- How would you compare your experience of onboarding with OeL to other onboarding experiences?
- Do you feel like the onboarding training was relevant to the specifics of what you do?
- Just to remind you, the onboarding process involved: a welcome phone call, a first-day welcome, a welcome packet, a first week schedule, a 30-day work plan, a list of required new hire trainings, an onboarding binder in OneDrive, and a shadowing process. What are some changes you would make to the design and/or content of the onboarding process?
- Should onboarding have been longer, shorter, or was it just about right?

ACCLIMATION

- Did your onboarding make you feel more or less confident that you could do your job well?
- What do you believe should be OeL's top priority for improving their employee onboarding process?
- If you were to pick out some events or activities (meetings, shadowing, etc.) that might make a new hire feel a lack of social integration, what would they be?
- What events enhanced your feeling of social integration?
- [Ask if not answered above] OeL's regular meetings are key to keeping everyone informed and coordinated. Looking back on the Distance Ed and OeL team meetings, how well were you able to understand the matters being discussed in the early meetings?
- About how many weeks did it take you to fully understand the matters being discussed?

OEL CULTURE

- What are some aspects of OeL's culture that you've learned since onboarding that you wish were made clear earlier?
- What are some aspects of your place within OeL that you've learned since onboarding that you wish were made clear earlier?

JOB EXPECTATIONS AND ROLE

- What were some specific tasks for which you felt unprepared?
- What resources have you acquired or created for yourself since onboarding to fill in knowledge gaps?

WRAP-UP

- Is there anything else you wish you had been told during onboarding?
- What are some other ways OeL's onboarding training can be improved?
- Ask about opportunity to observe. Set up dates and times.

APPENDIX D: DIRECTOR OF OEL INTERVIEW QUESTIONS

- Do you have your own checklist or guide for what information to cover when onboarding a new employee?
- Are there documents outlining the expectations of an instructional technician and instructional designer at UNCW?
- What expectations were communicated to the instructional designer and to the instructional technician?
- How are the items in the first-week schedule determined?
- How is the 30-day work plan determined?
- In your opinion, how well do you think the instructional technician has acclimated to her role?
- In your opinion, how well do you think the instructional designer has acclimated to her role?
- To your knowledge what improvements could be made to the design or content of the onboarding program?
- Nikki and I developed a checklist to use when observing the new hires. The performance indicators we drafted came from the Full Cycle performance appraisal tool for EHRA employees. Would you say that is an adequate basis for performance indicators, or should we use something else?
- Do you know if the new hires received information about Full Cycle during their onboarding?
- Any other thoughts?

APPENDIX E: OBSERVATION CHECKLIST

Indicator	Confirmation (Y/N)	Comments
Trainee communicates in a manner that:		
clearly and accurately conveys information		
is professional and respectful in tone		
is suitable for the target audience		
is concise but sufficient in terms of required detail.		
-Trainee effectively utilizes awareness of self and audience in verbal and/or written expression to communicate...		
... with colleagues		
... with clients		
... with supervisory management		
... with other individuals in the work setting		

-Trainee actively listens to determine the most effective way to address customer/colleague needs and concerns.		
-Trainee follows through on commitments, despite time pressures or obstacles		
-Trainee timely responds to requests.		
-Trainee maintains a professional and respectful tone and exhibits diplomacy when dealing with frustrated individuals or during sensitive or confrontational situations		
-Trainee demonstrates a mastery of the relevant technical or task-specific expertise necessary to perform assigned duties, which may include knowledge of relevant research methods, technology, procedures, policies or other methods, standards or techniques that are specific to the employee's position and profession.		
-Trainee demonstrates relevant technical or subject-matter knowledge at a level sufficient to perform the duties of the		

position in an accurate and professional manner without requiring an unusual degree of oversight or correction.		
-Trainee produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee's position and profession.		