

Needs Analysis Report

Improving Employee Onboarding at ACUI



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R621-Needs Assessment



JAVA SEA UNITED

Executive Summary

The purpose of this needs assessment was to assess the gaps in supervisor-led employee onboarding at Association of College Unions International (ACUI) and to recommend options that would help ACUI employees perform their job roles to meet organizational goals. This needs assessment project produced the following findings and recommendations:

Findings – Positives

1. ACUI has a positive work environment that fosters assimilation of new employees and close collaboration among staff.
2. Supervisors hold themselves accountable to provide quality onboarding.
3. New employees are provided with a job manual containing materials that cover relevant knowledge and skills to aid them in day to day work.
4. The utilization of just-in-time strategy during onboarding aids in transfer of learning as there are immediate opportunities to apply new knowledge.
5. New employees wish for more control over latter stages of the onboarding process.
6. Staff are willing to invest time in creating documentation.

Findings – Areas for Improvement

7. The onboarding process could be better customized based on new and internal transfer employees' needs.
8. The lack of overall ownership of the onboarding process results in confusion over the purpose and objectives for several onboarding activities.
9. The scope of the onboarding checklist can be overwhelming and is not universally applicable to all new employees.
10. The lack of instructional design principles embedded in the onboarding results in suboptimal learning and low confidence in staff when first taking on their new jobs.
11. The lack of agreement on creating and reviewing documentation (e.g., PAM, CAMS and Authorize.net) has inhibited several staff's work performance.
12. The lack of a consistent file organization structure across departments often leads to inefficiency in locating relevant files.
13. The overwhelming job scopes and high workload environment often results in a reactive approach to problem-solving.
14. There is overreliance on individuals to perform or oversee certain specialized tasks, leading to loss of institutional memory when that person leaves.

Recommendations

- Appoint qualified staff as Onboarding Lead to take ownership of the onboarding process, which will be supported by the staff development team.
- Break the onboarding process into block phases.
- Establish a documentation working group led by one of the directors and supported by representatives from different departments.
- Systematically expand and diversify staff's core competencies and institutional knowledge.
- Create an annual committee to deliberate on, analyze, and execute organizational to-do list.

Acknowledgements

We would like to express our appreciation to the entire staff at ACUI who made this needs assessment possible through their consistent support in our data collection efforts.

We thank Ms. Scarlett Winters for giving us the opportunity to work with ACUI on this needs assessment project and for her continuous support in providing guidance and feedback to our work. We are grateful to Dr. John Taylor, ACUI's CEO, who generously took time off his busy schedule to provide us with valuable insights and suggestions. We also thank those who hosted us warmly at ACUI's central office during our visits to conduct interviews and focus group discussion.

Lastly, we would like to express our gratitude to Dr. Yonjoo Cho for her unwavering dedication throughout this needs assessment project to refine the quality of our work with her constructive and sincere advices.

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Introduction

We partnered with Association of College Unions International (ACUI) to conduct a needs assessment of their employee onboarding. This report summarizes the frame factors, project methodology, SWOT analysis, key findings, and recommendations with implementation steps and critical success factors.

Aim and Scope

The purpose of this needs assessment was to assess the current gaps in supervisor-led employee onboarding at ACUI and to recommend options that will help ACUI employees perform their job roles to meet organizational goals.

Background

ACUI is a non-profit educational organization headquartered in Bloomington, Indiana that brands itself as a knowledge-based organization with identified core competencies to support its members in the development of campus community through education, advocacy, and the delivery of services. Regarded as the professional home to campus community builders, ACUI brings together college union and student activities professionals from hundreds of schools across seven countries.

The work in ACUI is primarily supported by 25 paid staff and over 470 volunteers. Due to its lean organizational structure, ACUI relies on appointing direct supervisors to administer on-site onboarding for every new employee hired. While the onboarding process is primarily guided by a checklist, it lacks a structural approach to deliver consistent onboarding results. Hence, ACUI management sees this as an opportunity to engage our team in conducting a needs assessment to improve its employee onboarding process.

Following the initial client meeting with Ms. Scarlett Winters (henceforth referred to as “the client”), we identified the key stakeholders for this needs assessment project to include (1) new employees who have completed their onboarding within the last six months, (2) supervisors who conducted onboarding for the said employees, and (3) executive management with the authority to decide on both short-term and long-term changes.

Frame Factors

Frame factors are conditions or circumstances that could limit or constraint the process involved in this needs assessment project. The following are internal (relative to our team) and external (relative to ACUI) frame factors identified when initiating this project:

Internal

- **Limited time:** There are only 11 weeks to complete this project due to semester course scheduling.
- **Extended content analysis process:** We accumulated 6.8 hours of interview data which resulted in a longer than expected content analysis process. This in turn affected our original schedule for subsequent data collection and analysis.

External

- **Availability of stakeholders:** The involvement of multiple stakeholders inevitably led to scheduling challenges and the need to recognize that staff's participation could be constrained by unexpected work exigencies.

Project Methodology

The project methodology consists of three main phases with each phase represented by key activities involved during the process (see Figure 1).

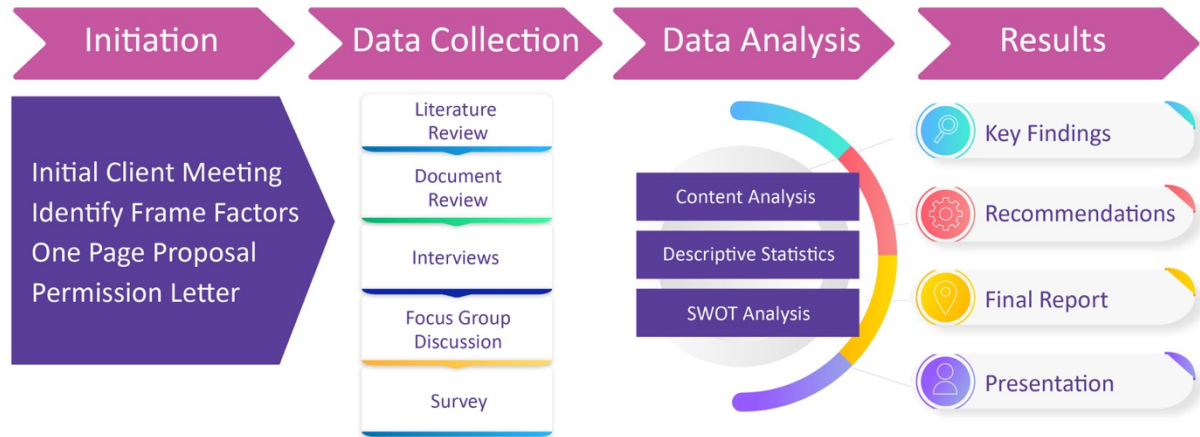


Figure 1. Phases and activities of project methodology.

Projection Initiation

We began by conducting an initial client meeting to discuss the purpose and scope of this needs assessment project, as well as to better understand the current situation and concerns from the client’s perspective. Additionally, we gained potential leads for data collection sources and discussed frame factors that were likely to impact the final product of this needs assessment.

Following the meeting, we developed a one-page proposal (see Appendix A) to outline the purpose, background, key stakeholders, frame factors, data collection and analysis methods, and the tentative schedule and division of labor for this needs assessment project. The client endorsed the one-page proposal and presented us with a signed permission letter (see Appendix B), allowing us to move to the next phase of this project.

Data Collection and Analysis

We launched into the next phase of this needs assessment project by employing a variety of methods to gather data from different sources. This approach enabled triangulation of data, thus allowing us to more confidently support the validity and reliability of our findings. Specifically, we utilized literature review, document review, interviews, focus group discussion, and survey for data collection. Each of these are discussed below.

Literature Review

We began by searching Google Scholar and IUCAT (Indiana University's online library catalog) to look for articles related to onboarding strategies, learning transfer of job-specific skills, turnover, and organizational alignment and excellence in non-profit organizations (see References). Articles were selected based on time-relevancy (i.e., post-2000 when published) and credibility of its source (i.e., from recognized professional journals, authors or websites).

Document Review

To better understand the existing state of employee onboarding, we made additional requests to gain access to the training handbook for employee onboarding, as well as account permissions to participate in online training modules on ACUI 101, and Orientation for new volunteers and community of practice leader training. We also analyzed Human Resource documentation: the organizational chart, performance evaluation review sheet, and the turnover rate. Lastly, we went through ACUI's strategic goals and values on the organization's official website to better understand their working climate.

Interviews and Focus Group Discussion

Based on the data from both literature and document reviews, we developed semi-structured interview questions (see Appendix C) for three distinct groups: (1) employees hired within the past year, (2) the CEO, Dr. John Taylor, and (3) department directors. We successfully conducted interviews with four employees hired within the last year, conducted the interview with the CEO, and held a focus group discussion with four department directors. With reference to the first group, we were unable to interview the fourth employee, who had completed onboarding within the last six months, due to a scheduling conflict. Therefore, we made a decision to interview one more employee who had completed onboarding within the past year. All interviews were conducted in-person and audio recorded with interviewees' permissions in ACUI's central office, accumulating to 6.8 hours of audio recordings.

We also conducted an additional activity at the end of the abovementioned interviews with first year employees to measure these individuals' understanding of their job responsibilities in relation to ACUI's strategic goals. Specifically, these employees were asked to fill up a strategic priorities alignment worksheet (see Appendix D) by marking any ACUI's annual strategic priorities that they felt resonated with their job responsibilities. Copies of this worksheet were then presented to their direct supervisors to identify priorities that they associated with the said employee's job responsibilities. By comparing and contrasting both sides of the responses, we were able to have a glimpse into the state of strategic alignment within the organization.

Post interviews, each team member shared the load to transcribe interview responses and provided preliminary coding before we came together to revise the codes. Inconsistencies and disagreements were discussed within the team until consensus was achieved. Content analysis was used to generate emerging themes using data from interviews and the strategic priorities alignment worksheets, which were then triangulated with other data sources.

Survey

As the final data collection method, we launched an online survey that sought to validate emergent themes from content analysis. The survey questionnaire (see Appendix E) consisted of 11 close- and open-ended primary questions, designed to elicit feedback from 21 ACUI staff on several aspects of employee onboarding and other related organizational processes. To ensure neutrality and relevance of this survey, we omitted the CEO, the client and two other third-party contracted staff from the survey population.

Prior to distribution, we pilot-tested the survey questionnaire with our course instructor and fellow course mates before seeking feedback from the client. After finalizing the survey questionnaire, we began preparing for survey recruitment. As part of the overall strategy to maximize the response rate, we suggested and facilitated for the client to distribute the survey invitation emails and to solicit further participation through broadcasts over ACUI's Slack channel (instant messaging platform). Three days after the survey was launched, we sent out personalized email reminders to all survey participants.

The survey was promptly closed at the end of the fifth day and a total of 20 completed responses were recorded (95% response rate). We analyzed the survey results using descriptive statistical analysis to support or refute earlier findings. Additionally, we investigated topics which we had not previously because of time constraints (e.g., question on internal transfer).

Key Highlights

A record of key highlights from each data collection method can be found in Appendix F.

SWOT Analysis

SWOT analysis consists of internal factors (Strengths and Weaknesses) that management team could leverage or improve on within ACUI. The external factors (Opportunities and Threats) indicate outside circumstances that could impact ACUI as a whole.

<p>S Strengths</p>	<ul style="list-style-type: none"> • Strong understanding of ACUI organizational goals, and to a lesser extent CSHEMA • Positive work environment that supports onboarding initiatives • Sense of accountability by supervisors to ensure quality onboarding • Effective communications between supervisors and subordinates on strategic alignment • Consistent appreciation of having job manual for employee onboarding • Good use of just-in-time strategy to provide efficient and effective job-specific training
<p>W Weaknesses</p>	<ul style="list-style-type: none"> • Lack of ownership of employee onboarding • Lack of onboarding support for internal transfers • Lack of agreement in creating and reviewing documentation to support job performance • Poor execution of IT migration; interfering with day to day job responsibilities • Reactive approach to problem-solving caused by overwhelming job scopes and high workload • Over-reliance on the individual to perform or oversee certain specialized tasks • Lack of instructional design principles embedded in the onboarding process • No consistent file organization structure across departments • Lack of competitive pay grade and career advancement options within organization • Poor understanding of IACLEA and NCCI’s organizational goals for those who are not directly handling these organizations
<p>O Opportunities</p>	<ul style="list-style-type: none"> • Leveraging sister associations for information sharing in order to cultivate core competencies and provide hands-on job-specific training • Strengthening the off-boarding program to maximize the possibility of job referrals and rehiring • Leveraging programs at IU Bloomington to meet ACUI’s needs • ACUI can establish itself at the forefront of innovation in student affairs for online and distance education • Opportunity to fill the void in College Union competencies outside of North America • Utilization of automated software to optimize onboarding experience • Diversifying nationality of staff to take advantage of expanding college enrollments abroad
<p>T Threats</p>	<ul style="list-style-type: none"> • The tendency for over-reliance on third-party services as a small organization • Limited workforce population within Bloomington, resulting in constraints faced during the hiring process • Declining enrollment in face to face classes in higher education may lead to decreased demand for student affairs services provided by members of ACUI, CSHEMA, and IACLEA • Historically low unemployment rates in recent years may lead to difficulty in retaining staff within an organization • The vulnerability of non-profit organizations whenever unfavorable external regulations (e.g., Tax Reform) are passed • Socialization of Higher Education in the US would wipe out revenue from member institutions

Key Findings

After analyzing all the collected data and synthesizing them into the SWOT Analysis, we present the following key findings on positives and areas for improvement.

Positives

1. ACUI has a positive work environment that fosters assimilation of new employees and close collaboration among staff.
2. Supervisors hold themselves accountable to provide quality onboarding.
3. New employees are provided with a job manual containing materials that cover relevant knowledge and skills to aid them in day to day work.
4. The utilization of just-in-time strategy during onboarding aids in transfer of learning as there are immediate opportunities to apply new knowledge.
5. New employees wish for more control over latter stages of the onboarding process.
6. Staff are willing to invest time in creating documentation.

Areas for Improvements

7. The onboarding process could be better customized based on new and internal transfer employees' needs.
8. The lack of overall ownership of the onboarding process results in confusion over the purpose and objectives for several onboarding activities.
9. The scope of the onboarding checklist can be overwhelming and is not universally applicable to all new employees.
10. The lack of instructional design principles embedded in the onboarding results in suboptimal learning and low confidence in staff when first taking on their new jobs.
11. The lack of agreement on creating and reviewing documentation (e.g., PAM, CAMS and Authorize.net) has inhibited several staff's work performance.
12. The lack of a consistent file organization structure across departments often leads to inefficiency in locating relevant files.
13. The overwhelming job scopes and high workload environment often results in a reactive approach to problem-solving.
14. There is over reliance on individuals to perform or oversee certain specialized tasks, leading to loss of institutional memory when that person leaves.

Recommendations

Based on the key findings, we present the following five recommendations along with implementation steps and critical success factors that will help ACUI successfully execute these recommendations.

Recommendation #1

Appoint qualified staff as Onboarding Lead to take ownership of the onboarding process, which will be supported by the staff development team (*Findings 3, 8, 9 & 10*).

Implementation Steps:

- a. Management team appoints a qualified staff to serve as Onboarding Lead.
- b. Onboarding Lead schedules time for monthly meeting with staff development team to discuss and receive assistance on onboarding issues.
- c. Onboarding Lead assigns onboarding item owners (i.e., stakeholders identified to take charge of individual onboarding activity) and work with them to determine:
 - i. Learning/performance objectives for their respective onboarding activity.
 - ii. Form of suitable practice/assessment for their respective onboarding activity.
- d. Onboarding Lead works with staff development team to:
 - i. Create the first block phase of onboarding based on common topics, activities, and training applicable to all job positions. *See recommendation #5 for details.*
 - ii. Establish consistency of content in job manual for the first block phase.
 - iii. Institute shorter cycle of formal performance evaluation for hires under two years employment (suggest on a semi-annual basis based on survey results).
 - iv. Periodically review utility and relevance of onboarding activities.
- e. Onboarding Lead creates and institute a feedback system in onboarding process to drive continuous improvement (i.e., formative evaluation).
- f. Repeat steps as necessary based on analysis from feedback system.

Critical Success Factors:

- Identified staff (preferably with instructional design or educational background) who is willing to serve as Onboarding Lead to take ownership of the onboarding process.
- Sufficient support from staff development team to assist Onboarding Lead.
- Onboarding items owners who are supportive of the decisions made by Onboarding Lead.
- A formal process in place to log staff's inputs and provide them to Onboarding Lead for decision making.

Recommendation #2

Break the onboarding process into block phases (Byford, Watkins, & Triantogiannis, 2017) (Findings 4, 5, 7 & 9).

Implementation Steps:

First Phase: Universal Onboarding (All new hires)

- a. Onboarding Lead, in concert with the staff development team, develops onboarding program based on common topics, activities, and training applicable to all job positions (we recommend up to two months).

Second Phase: Follow Up Activities (All new hires)

- b. Supervisor and subordinate revisit checklist to determine topics, activities, and training that need to be followed up on.
- c. Supervisor provides refresher to subordinate or locates relevant in-house trainer to provide support.

Third Phase: In-depth Job Specific Training (All new hires and internal transfers)

- d. Supervisor and subordinate generate customized onboarding list of items or topic areas, as well as learning approaches, which would aid in job specific training.
- e. Supervisor delivers or delegates responsibility for fulfilling the job specific training items or topic areas based on the customized onboarding list.

Critical Success Factors:

- Availability and commitment from supervisors to provide customization and follow up on second phase of onboarding plan.
- In-house trainers who are available and committed to provide support to the onboarding plan.
- Subordinates who are able to recognize their own job specific needs for second phase of onboarding plan after two months into their jobs.
- Onboarding Lead is able to design common phase of onboarding that is applicable to all job positions.

Recommendation #3

Establish a documentation working group led by one of the directors and supported by representatives from different departments (*Findings 4, 6, 11, 12 & 13*).

Implementation Steps:

- a. Management team appoints a director to head the working group.
- b. Each department elect a representative to serve on the working group (it is recommended that they double as subject matter experts).
- c. Working group develops tiered system to categorize current and anticipated needs for documentation and Standard Operating Procedures (SOPs) based on a defined set of criteria.
- d. Working group collects inputs across the organization to determine the state of documentation and SOPs needs on a semi-annual frequency.
- e. Working group creates, revises or retires documentation (suggest looking at *CAMS*, *PAM*, and *Authorize.net* first) and SOPs (suggest looking at *file management* and *organizational to-do list* first) based on staff feedback.
- f. Working group institutes and builds awareness of updated documentation and SOPs in the organization.
- g. Working group tracks progress for documentation creation or update.

Critical Success Factors:

- Staff who are willing to invest time in creating documentation that matters to them.
- Staff who are willing to provide honest feedback on documentation and SOPs needs.
- Emphasis from management team regarding the importance of having this working group to drive documentation efforts.

Recommendation #4

Systematically expand and diversify staff's core competencies and institutional knowledge (Findings 2, 10 & 14).

Implementation Steps:

- a. Staff development team identifies staff's core competencies and institutional knowledge that must be preserved (e.g., CAMS).
- b. Staff development team locates instructional design expertise from within or outside of the organization.
- c. Instructional design experts (within or outside of ACUI) create and distribute educational materials to introduce key instructional design principles in layman terms.
- d. Staff development team locates relevant professional development courses or conferences related to workplace learning and performance.
- e. Management team sends qualified staff to the identified professional development courses or conferences.
- f. Management team facilitates cross training of qualified staff based on to be preserved core competencies and institutional knowledge identified by staff development team.

Critical Success Factors:

- Staff are willing to attend professional development which most directly benefits the organization.
- Sufficient budget to support the recommended professional development courses or conferences.
- Instructional design experts who are willing to invest time in making in-house educational materials for introducing key instructional design principles.
- Staff development team is effective in identifying staff's core competencies and institutional knowledge which must be preserved.
- Opportunities to practice knowledge and skills in a systematic manner after staff receive cross training or complete the identified professional development.
- Management team who is motivated to provide cross-training for employees.

Recommendation #5

Create annual committee to deliberate on, analyze, and execute organizational to-do list (Finding 13).

Implementation Steps:

- a. Assign a committee chair for managing and being the point of contact for the organizational to-do list system.
- b. Committee chair recruits committee members for organizational to-do list at the start of Quarter 4.
- c. Committee creates year end survey for rank ordering list of organizational items based on input received from organizational to-do list tracking system.
- d. Committee creates plan (including budget, personnel, and timeline) for achieving highly ranked items from the survey.
- e. Committee submits plan for highly ranked items to the CEO for approval.
- f. Committee deliberates and delegates responsibility for achieving highly ranked items based on the CEO's feedback.
- g. Repeat step a-f on an annual basis.

Critical Success Factors:

- Identified staff who is willing to serve as committee chair to lead this annual committee to deliberate on, analyze and execute organizational to-do list.
- Effective implementation of SOP for tracking non-urgent organizational issues.
- Competency within committee to create surveys and analyze its results.

Appendix A: One-Page Proposal

Improving Employee Onboarding at ACUI

Purpose: The purpose of this needs assessment is to assess the supervisor-led employee onboarding in Association of College Unions International (ACUI) and to recommend options that will help ACUI employees to perform their roles in meeting organizational goals.

Background: A supervisor-led employee onboarding is administered on-site for every new employee hired in ACUI. While this task is primarily guided by a checklist, it lacks a structured process to deliver a consistent onboarding experience for employees. In contrast, their volunteer onboarding delivered online has adopted a stronger instructional emphasis in its design. The ACUI management sees this needs assessment as an opportunity to improve its onboarding experience; firstly for its employees, but also for its volunteers if the opportunity arises.

Key Stakeholders: These will include (1) new employees who have completed their onboarding program within the last six months, (2) supervisors who conducted onboarding program for the said employees, and (3) executive management with the authority to decide on both short-term and long-term changes.

Frame Factors

- Time and workload: A 11-week timeline amid other competing academic demands placed on members.
- Availability of stakeholders: Staff's participation could be constrained by unanticipated work exigencies.

Data Collection and Analysis Methods

- Literature review on onboarding strategies, job specific training, and organizational alignment in non-profit organizations.
- Document review of existing training materials, past needs assessments, performance reviews, turnover rate, and ACUI's goals and values statements.
- Interviews with four new employees and two representatives from executive management to identify priorities.
- A focus group with three supervisors to examine trade-offs and feasibility of achieving employees' needs.
- An online survey conducted with all 25 ACUI staff (i.e. executive management, supervisors and employees) to build consensus relating to key findings gathered from interviews and focus group.
- Content analysis of the interview and focus group data.
- Descriptive statistical analysis of the survey data.
- SWOT analysis to synthesize all analyzed data.

Tentative Schedule and Division of Labor

Task	Deadlines	Responsibility
Initial meeting with Client	Sep. 12	Max
One-page Proposal	Sep. 23	Desmond
Permission Letter	Oct. 7	Taufik
Data Collection: <ul style="list-style-type: none"> • Literature Review • Document Review • Interviews • Focus Group • Online Surveys 	Oct. 2 Oct. 4 Oct. 21 Oct. 23 Oct. 31	Taufik Desmond Max Taufik Desmond
Data Analysis: <ul style="list-style-type: none"> • Content analysis of the interview and focus group data • Descriptive statistical analysis of the survey data 	Oct. 24 Nov. 1	Max Desmond
Progress Report	Oct. 28	Max
SWOT Analysis Draft	Nov. 4	Taufik
Draft Report and Presentation	Nov. 18	Desmond
Client Feedback on Findings and Recommendations	Week of Nov. 18	Taufik
Final Report to Client and Dr. Cho	Dec. 2	Desmond
Final Presentation to Client	Week of Dec. 2	Max

Appendix B: Permission Letter



One City Centre, Suite 200
120 W. Seventh St.
Bloomington, IN 47404-3839 USA
www.acui.org

October 2nd, 2019

Attention: Max Anderson, Taufik Slamet and Desmond Tan
Java Sea United
Wendell W. Wright Education Building
201 N. Rose Avenue
Bloomington, IN 47405

Dear Java Sea United,

The purpose of this letter is to state an agreement for a needs assessment project in our organization. We are seeking analysis and recommendations on how we can potentially improve our employee onboarding process. We expect this needs assessment to contribute strategically in preparing new ACUI employees to competently perform their roles in meeting organizational goals. To facilitate this collaboration, we will grant you access to our primary stakeholders and relevant documents. At the same time, we will endeavor to support both your data collection needs as well as your overall work schedule for this project.

ACUI expects that Java Sea United to submit the final report of this project to our stakeholders on December 2nd, 2019, followed by a presentation within the same week. We give you permission to use our name and logo in your final report and presentation.

We expect that our collaboration will achieve great benefits for both parties.

Sincerely,

Scarlett Winters
Online Engagement Specialist
ACUI
swinters@acui.org
ph. 812-245-8095

Appendix C: Interview Protocol

Interview Questions for Employees

1. Please briefly introduce yourself.
2. Where are you in the onboarding process?
 - a. Who is/was the manager who provided you the employee onboarding?
 - b. What role did your manager play in your onboarding experience?
3. On a scale of 1 to 10, 1 being extremely unsatisfied and 10 being extremely satisfied, how will you rate your recent onboarding experience? Why?
 - a. Is there anything you thought was particularly bad in onboarding?
 - b. Is there anything you thought was particularly good in onboarding?
4. Do you feel you are given the opportunity to provide input on the onboarding process?
 - a. Given a chance, would you like to give your input?
5. Has the onboarding process helped to clarify your job scope? How so?
6. To what extent did your onboarding experience help you to understand the connection between your job role and how it supports the organization?
 - a. How much do you think you understand the kind of work your colleagues in other departments are involved in?
7. How confident do you feel in performing your job requirements after the onboarding process?
 - a. Can you give us an example of how you utilized new information or skills acquired from the onboarding process?
8. How would you describe your rapport with your colleagues after the first month? What role do the one to one meeting play in this process?
 - a. If you needed to ask someone for general advice on something unexpected who do you go to?
9. Can you describe how the job specific training was carried out or is being carried out? How long has the process been?
10. To what extent does the job specific training help in your everyday job responsibilities?
 - a. Any other suggestions for changes in job specific training to be introduced?
11. How often have you been given feedback on your performance within the first year at work (or up till your current tenure)?
 - a. How useful has the feedback been for you?

12. How are you informed of your HR-related benefits?
13. What do you think of the IT Portion of onboarding?
14. How will you describe your experience for the systems familiarization training (e.g., CMS, CAMS, PAM, Zoom)?
15. If an ACUI employee is considering leaving the company, why would that be?
16. Is there anything else you would like to add?

Interview Questions for the CEO, Dr. John Taylor

1. Can you start by briefly describing how you would envisage ACUI to be managing other sister associations (i.e., CSHEMA, IACLEA, and NCCI) concurrently? How do they fit together?
2. On a scale of 1 to 10, 1 being extremely unsatisfied and 10 being extremely satisfied, how will you rate the current state of employee onboarding? Why?
 - a. Any particular department's onboarding that has been faring poorly?
 - b. Any particular department's onboarding that has been performing well?
3. What is the broad guidance for employee onboarding that you have given to the directors?
 - a. Is there any particular guidance that you do not think is being adhered to?
 - b. To what extent do you expect modeling and coaching by Directors to be part of employee onboarding in support of ACUI goals and values?
 - c. To what extent do you set expectations for Directors to promote ACUI's goals and values during employee onboarding?
4. To what extent do you see the organization fulfilling the annual priorities as laid out in the strategic guideposts?
 - a. Which part of this gap do you think could be addressed through employee onboarding?
5. How will you describe an ideal employee onboarding?
 - a. Where do you think are the missing components to achieve this ideal state?
 - b. How much onboarding time are you willing to give each new employee before you expect them to be able to hold their own?
 - c. How would you feel about an elongated onboarding process for 6 months?
6. What would be ACUI's constraints for implementing potential recommendations?
 - a. What kind of budget would be available to ACUI?
 - b. To what extent does the organization have the capacity to create a revamped onboarding process?

7. During your one to one meeting with news employees, do you discuss their onboarding experience?
 - a. Do you take it upon yourself or is there someone else other than their directors that you think should be ensuring that new employees are getting quality onboarding experience?
 - b. Do you ever expect people who are not directors to lead the onboarding?
8. How do you promote social connection and employee job satisfaction?
9. Is there anything else you would like to add? Anything else we should know?

Questions for Focus Group Discussion

1. On a scale of 1 to 10, 1 being extremely unsatisfied and 10 being extremely satisfied, how will you rate your previous performance for providing employee onboarding? Why?
 - a. What kind of support/structure is available to aid you in providing employee onboarding?
 - b. Was there anything you thought was not useful to your employees during the onboarding process?
2. How do you make your employees see how they fit into the bigger picture of the organization?
 - a. Is this adequately supported by available learning materials?
3. How did you incorporate the strategic guideposts and values of the organization when providing employee onboarding?
4. How do you administer job-specific training during employee onboarding?
 - a. What learning materials do you provide to employees?
 - b. What is your process for developing these learning materials when nothing formal is in place?
 - c. How often do you update learning materials such as the employee handbook?
5. Do you ever collaborate with other directors in providing job-specific training to your new employee? Do you think that would be useful?
 - a. Is there a potential performance improvement in another department that could positively impact your department's performance?
6. How do you manage job-specific training for employees who are given new job responsibilities?

7. What kind of feedback system do you have for improving the onboarding process? If at all?
 - a. If no, do you think there should be? (e.g., a survey reaction sheet)
 - b. If so, what are the onboarding issues commonly raised? How do you actively track those challenges? To what extent do you address those?
8. How do you provide feedback for new employees' performance within their first year?
 - a. Is there a formal or informal process? How often does this performance feedback occur?
9. How long does the onboarding process take for your new employee?
 - a. What informs this decision on onboarding length?
 - b. At what point will you provide autonomy for new employees to assume their job responsibility?
 - c. If you are asked to provide a 6-month employee onboarding process, how would you change your onboarding process?
10. How do you work with new employees to determine their preferred learning methods?
 - a. Do you feel you are adequately equipped and supported to carry out customized training styles for new employees?
 - b. If not, what do you think could solve the gap?
11. If an employee of ACUI were considering leaving the company, why do you think that would be?
 - a. To our understanding, two people within a year time frame have left ACUI within the first six months of their employment. Is that correct? Did they tell you why they left?
 - b. What changes, if any, have you made?
12. How do you prepare new employees to understand the value proposition of ACUI when compared to competitors? (i.e., niche services, recruiting members as everyone's responsibility)
13. How do you address the unique needs of each of the four organizations to new employees during the onboarding?
 - a. Do you think this is accomplished during onboarding?
14. What resource constraints do you currently face in conducting the onboarding process for new employees and internal hires?
 - a. How do you juggle between your day-to-day job demands and setting time aside for employee onboarding?
 - b. What kind of system or process will help to alleviate the problem?
 - c. What kind of financial limitations do you face in developing new onboarding processes?

15. Do you feel that there is any part of the onboarding process that has no ownership?
16. Two employees discussed how there is no formal system for handling issues or potential organizational improvement raised to supervisors. It was described as “running around, putting out fires” and that things “just fall through the cracks”. What is your process for handling issues raised by employees/subordinates?
17. How do you achieve job clarity for the new employee in onboarding?
 - a. How do you provide a realistic job preview during recruitment and hiring?

Appendix D: Strategic Priorities Alignment Worksheet

End of Interview Activity

We would like to close this interview by hearing how you view the extent of your job role contributes to the ACUI's 2019 strategic plan. The following sections detail a replication of the four strategic guideposts retrieved from the ACUI's official website. Kindly mark those items from the list of annual priorities that you would consider to be part of your current job responsibilities in contributing to its success.

Strategic Guidepost: Research -- ACUI will take a leading role in researching the impact of the college union on campus.

We strive for ACUI to become the respected clearinghouse for college union and student activities research, which will assist practitioners in making informed decisions and help higher education leaders articulate the value and impact of the college union.

Annual Priorities: [***Please mark the following checkboxes as appropriate.***]

- Develop and strengthen partnerships focused on research.
 - Determine how staff and component groups can best use and advance the research agenda, emphasizing the topic of inclusive communities.
 - Enhance existing and develop new structures for the Association to collect and disseminate research, especially research related to inclusive communities.
-

Strategic Guidepost: Data -- ACUI will leverage data to enhance education and delivery of services.

As more individuals expect a personalized, customized association experience, ACUI must leverage available data to inform its strategies and business decisions. We will use data intelligence to more effectively explore new markets, enhance services, recruit volunteers, define educational gaps, and create just-in-time content.

Annual Priorities: [***Please mark the following checkboxes as appropriate.***]

- Determine opportunities to better personalize/customize the ACUI user experience.
 - Develop practices to make ACUI's data gathering, analysis, and application more effective and efficient.
 - Determine how to better reach international markets amid data privacy concerns.
 - Collect and report data to better understand demographic representation.
-

Strategic Guidepost: Volunteer and Member Engagement -- ACUI will increase the value of engagement for members and volunteers.

Member and volunteer engagement are critical predictors of retention and satisfaction. We are committed to understanding members, better meeting their needs, and creating different types of engagement experiences.

Annual Priorities: ***[Please mark the following checkboxes as appropriate.]***

- Learn and document volunteer and member journeys through ACUI.
 - Deepen institutional commitment to ACUI.
 - Leverage structures for networking and professional development, to include communities of identity.
 - Investigate desired engagement experiences among individuals who do not hold ACUI majority identities.
 - Identify opportunities to improve equity in volunteer recruitment and selection processes.
-

Strategic Guidepost: Active Dialogue -- ACUI will advance campus community through active dialogue.

We seek, through education, tools, and resources, to position the college union to promote dialogue and understanding among people with different perspectives and to improve humanity through college students' constructive discourse and interaction.

Annual Priorities: ***[Please mark the following checkboxes as appropriate.]***

- Define the value of active dialogue, in particular, about issues related to diversity, equity, and inclusion.
 - Define and understand the characteristics of a campus that supports active dialogue with an emphasis on issues related to diversity, equity, and inclusion.
 - Curate existing resources and tools related to active dialogue around diversity, equity, and inclusion.
-

Appendix E: Survey Questionnaire

Survey on Employee Onboarding at ACUI

Thank you for taking part in this important survey to help us understand more about employee onboarding at ACUI. Your honest response in this survey questionnaire will be used to inform changes for future onboarding implementations, which will serve to benefit new colleagues joining your department. This will in turn make the collaboration with your new department colleagues more seamless.

All responses provided will be kept confidential, and it should take you not more than 10 minutes to complete this survey. For questions, please contact Desmond Tan (destan@iu.edu).

Q1. How long have you been working in this organization?

- Under 1 year
- 1 year to 2 years
- 3 years to 9 years
- 10 years and over

Q2. Which organization's work do you primarily handle as part of your job responsibilities?
(Select all that apply)

- ACUI
- CSHEMA
- IACLEA
- NCCI

Q3. For the purpose of this question, “**organizational goals**” refer to strategic objectives set by higher management and/or board of trustees to outline expected outcomes and guide employees' efforts.

To what extent do you agree or disagree with the following statements regarding organizational goals?

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a. I fully understand the organizational goals of <i>ACUI</i> .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. I fully understand the organizational goals of <i>CSHEMA</i> .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. I fully understand the organizational goals of <i>IACLEA</i> .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. I fully understand the organizational goals of <i>NCCI</i> .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. My direct supervisor communicates clearly to me how my job responsibilities contribute to the organizational goals of my assigned organizations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q4. What resources are you using to align yourself with the organizational goals? (Select all that apply)

- One to one meeting
- Departmental strategic dashboard
- Formal performance evaluation session
- Staff retreat
- V2MOM (Vision, Values, Methods, Obstacles, Measures)
- Other (provide entry) _____

Q5. To what extent do you agree or disagree with the following statements regarding existing documentation?

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a. The current documentation on <i>Human Resource policies</i> (e.g., benefits, overtime compensation) is sufficient for me to perform required HR tasks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. The current documentation on <i>Information Technology policies</i> (e.g., bring your own device, home usage of company owned equipment) is sufficient for me to perform my day to day work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. The current documentation on <i>business model</i> (i.e., each organization's purpose, its goals, its ongoing plans for achieving them and its value proposition) is sufficient for me to perform my day to day work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. The current documentation on <i>organizational structure</i> (i.e., a hierarchy chart, job functions and responsibilities, key decision-makers) is sufficient for me to perform my day to day work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Not applicable
e. The current documentation on using CAMS (membership data system) is sufficient for me to perform my day to day work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. The current documentation on using OnPar support services (third-party vendor) is sufficient for me to perform my day to day work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. The current documentation on using PAM (teamwork management system) is sufficient for me to perform my day to day work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. The current documentation on using Authorize.net (financial systems) is sufficient for me to perform my day to day work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. The current documentation on using Nexonia (financial systems) is sufficient for me to perform required HR tasks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
j. I am willing to invest additional time to develop documentation that would help in my day to day work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q6. To what extent do you agree or disagree with the following statements regarding the use of *SharePoint* (file sharing system)?

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a. I can easily locate a file that is stored in <i>my</i> department's folder.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. I can easily locate a file that is stored in <i>another</i> department's folder.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q7. To what extent do you agree or disagree with the following statements regarding job responsibilities?

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a. The organization tailors my job to my career interests.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. I am willing to accept a higher title that strengthens my job resume but would have no additional compensation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. I feel that our current method of handling member's requests is working seamlessly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. I have sufficient understanding of my colleagues' job responsibilities to know who to go to.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Display This Question:

If Q1. How long have you been working in this organization? != Under 1 year

e. The rate of turnover in this organization over the past year has affected my job performance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
--	-----------------------	-----------------------	-----------------------	-----------------------	-----------------------

Q8. Do you see a need for setting aside funds to support onboarding needs?

- Yes
- No
- Undecided

Display This Question:

If Q8. Do you see a need for setting aside funds to support onboarding needs? = Yes

Assuming no additional funds are injected into this organization, which existing budget will you suggest reducing in order to provide the additional funding for onboarding training?
(Select all that apply)

- Professional development
- Staff retreat
- Other (provide entry) _____

Q9. Have you changed your job position within this organization?

- Yes
- No

Display This Question:
If Q9. Have you changed your job position within this organization? = Yes

To what extent do you agree or disagree with the following statements regarding job transition?

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Not applicable
a. My onboarding during the internal job transition was sufficient for me to perform my new job responsibilities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. My new direct supervisor addressed my job needs during the transition period.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Display This Question:
If To what extent do you agree or disagree with the following statements regarding job transition? = Strongly disagree
Or To what extent do you agree or disagree with the following statements regarding job transition? = Disagree

You have indicated "Strongly disagree" or "Disagree" for the previous statements regarding job transition. Could you share what was lacking during the onboarding for your new position?

Q10. How often do you think formal performance evaluation should be conducted?

- Quarterly
- Semi-annually
- Annually
- Other (provide entry) _____

Q11. What are the job resources and/or work processes that are lacking, if any, for you to perform your day to day job responsibilities?

Appendix F: Data Collection Highlights

From Literature Review

- 90% of new employees make the decision on whether to stay or leave the organization within the first six months of their employment (Aberdeen Group as cited in Johnson & Senges, 2010).
- The most important factor leading to decreased turnover is onboarding (Selden & Sowa, 2015).
- Managers should create a “personal” onboarding plan for new hires (Bradt & Vonnegut, 2017).
- Engage millennial employees by involving them in the onboarding planning (Ferri-Reed, 2013).
- Key measurements for successful onboarding include role-clarity, self-efficacy, acceptance by organizational insiders and knowledge of organizational culture (Bauer & Erdogan, 2011).
- Improve orientation training by beginning with a starter project before working on core business projects (Johnson & Senges, 2010).
- Non-profit organizations are values-driven oriented, and staff react well to autonomy, supportive relationships, transformational leadership, growth development, and feedback (Park et al., 2018).
- Valuing and developing human resources is one of the key tenets to achieve excellence in non-profit organizations (Nonprofit Coordinating Committee of New York, 2016).
- From 2016 to 2017, the percentage of enrolled students (in the US) not taking any online courses declined by 3.3% or roughly 446,000 students (Lederman, 2018).
- Online enrollment has experienced 14 consecutive years of growth (Seaman et. al, 2018).

From Document Review

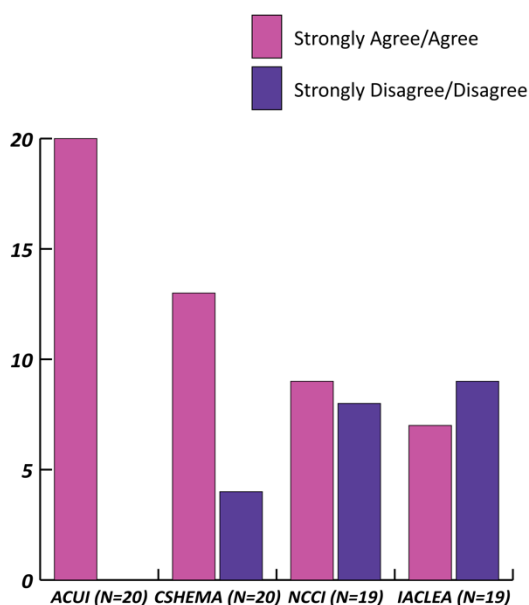
- Onboarding checklist is comprehensive but overwhelming at first look.
- No central policy governing how supervisors should be managing job specific training.
- Relatively flat organizational structure that could lead to lack of job clarity and advancement.
- Performance evaluation uses 360° feedback approach and is conducted annually for all staff.
- Inconsistent application of instructional design principles in online training modules.

From Interviews and Focus Group Discussion

- Complexity in understanding how the four organization (i.e., ACUI, CSHEMA, NCCI and IACLEA) come together and how to address each organization’s needs, especially for NCCI and IACLEA.
- Lack of a dedicated in-house HR department to take overall ownership of the onboarding process (e.g., assigning who to take charge of each item, implementing continuous improvement for the onboarding process as a whole, defining the framework for carrying out onboarding plans).
- From an instructional design standpoint, most onboarding items lack clarity on learning or performance objectives. There is also inconsistency in whether forms of practice or assessment are incorporated within the process to reinforce employee’s learning.
- Competing needs in employees hoping to have more formal processes and job manuals put in place versus finding the time and capacity to develop those.
- Tendency to overlook onboarding requirements, especially for job specific components, when internal appointment movement or organization restructuring happens.

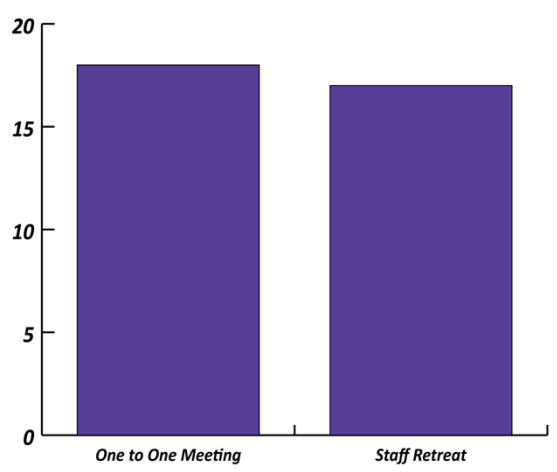
From Survey

Q3 I fully understand the organizational goals of...

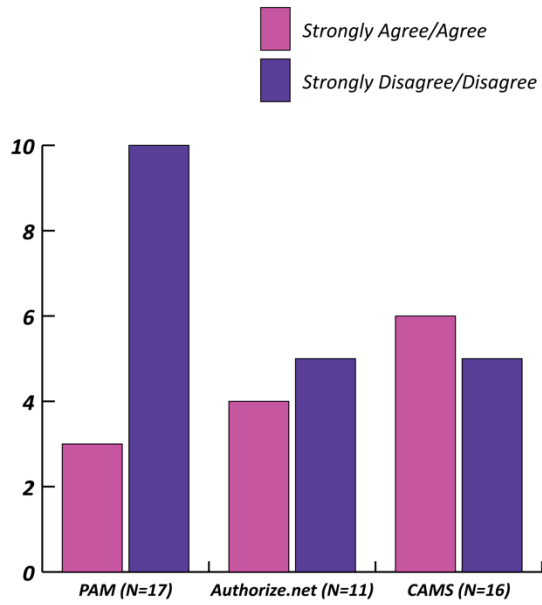


Q4 Resources used to align with organizational goals...

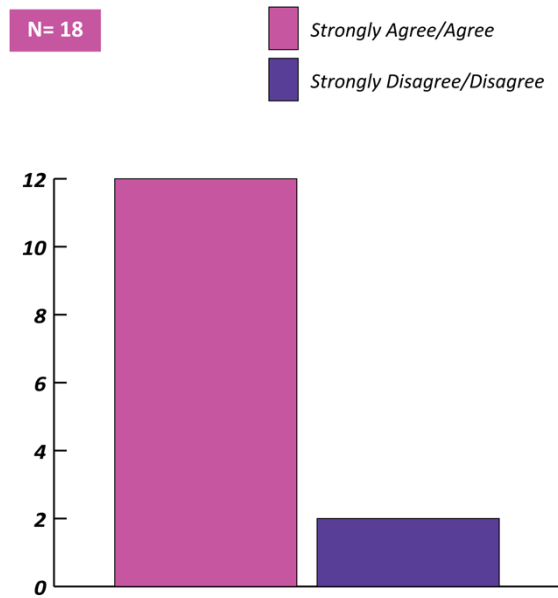
N= 20



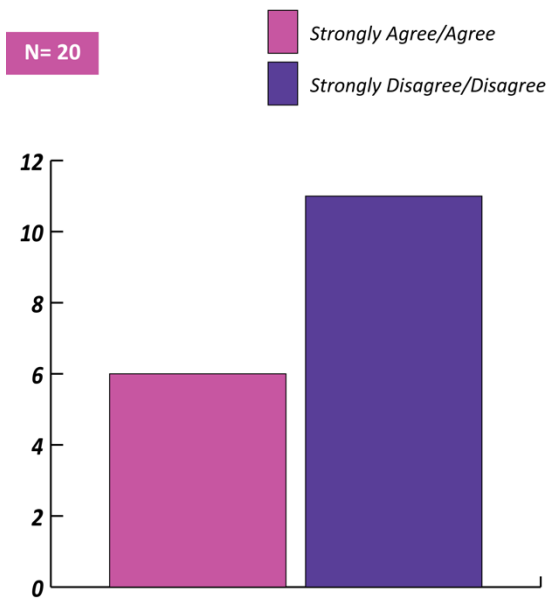
Q5 Existing documentation on _____ is sufficient to support routine use of the system



Q5 I am willing to invest time to develop documentation...



Q6 I can easily locate a file stored in another department's folder...



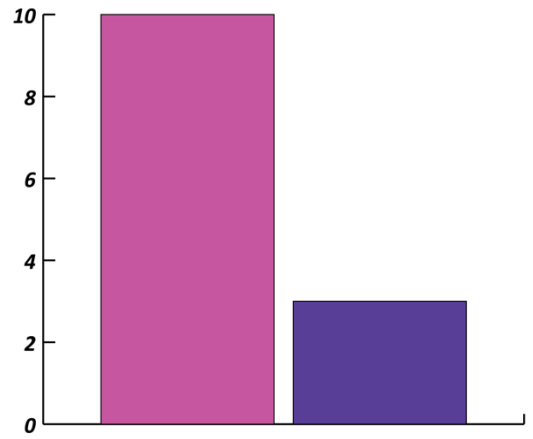
Q7 Our current method of handling member requests is working seamlessly...



Q7 *The rate of turnover in the past year has affected my job performance...*

N= 14

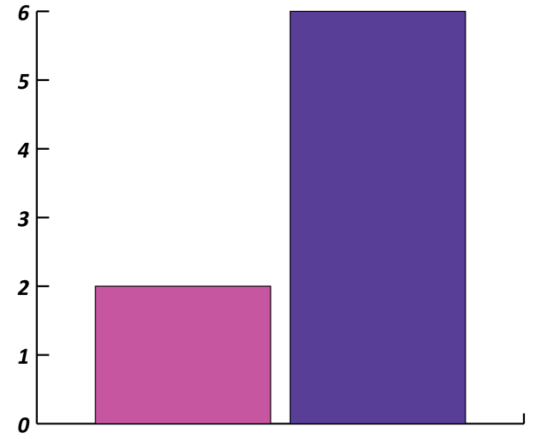
Strongly Agree/Agree
Strongly Disagree/Disagree



Q9 *My internal transfer onboarding was sufficient for me to perform my new job responsibilities...*

N= 9

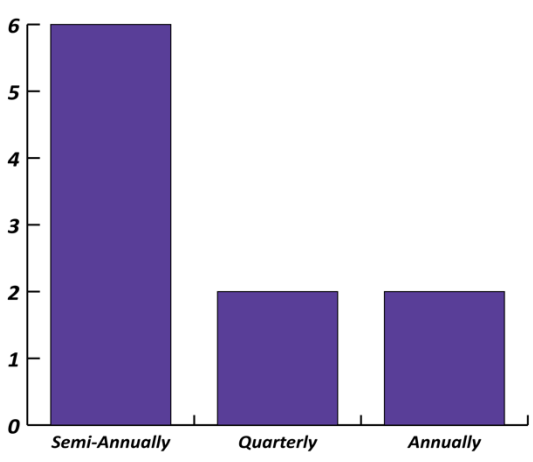
Strongly Agree/Agree
Strongly Disagree/Disagree



Q10 *Formal performance evaluation should be conducted...*

N= 10

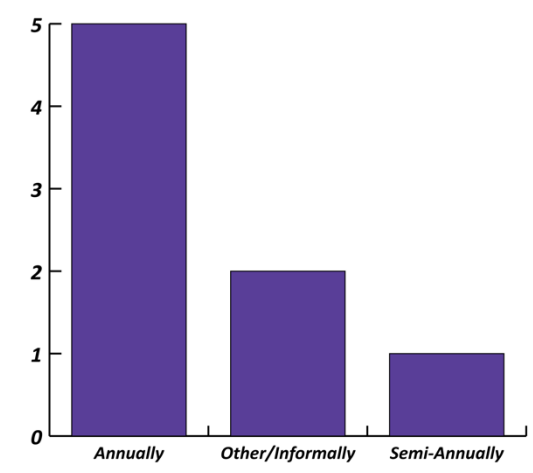
For those <2 Years at ACUI



Q10 *Formal performance evaluation should be conducted...*

N= 8

For those 10+ Years at ACUI



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