

Instructional Design

UNC Charlotte Continuing Education

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PROBLEM STATEMENT

Problem: The department of Continuing Education at UNC Charlotte does not have a robust onboarding process for new hires, nor a constant resource that serves as a knowledge base for current employees.

Solution: To develop an onboarding process that includes the complexities and various stakeholder interests within Continuing Education (Public Programs, Corporate and Custom Training, etc), along with the development of a robust knowledge base system for current employees to reference (and new hires after the onboarding process).

1. What problems are identified in the instruction of this content?

The goal of this content is to have 100% of new hires equipped with foundational training on core systems and policies for the department of Continuing Education. Currently there are many gaps in key content in the onboarding process, leading to delayed self sufficiency and loss of productivity. The content will also serve a reference material in the larger knowledge base of the unit for reference. The new onboarding process and context would benefit not just new hires but the department as a whole, including the students they serve.

2. Briefly, describe the instructional context. You will be elaborating on this in the next phase.

UNC Charlotte Continuing Education offers non-credit educational courses for individuals and employers. The department currently has 15 staff members, with some serving multiple departments. Employees have key areas of focus, accounting, marketing, registration, operations, program development, human resources and IT.

The instructional context will need to be designed based on the key area of focus the new employee is assigned too. It will also need to cover general overview of the other areas since many roles overlap or work together. Training will also include core technology software for the unit (DestinyOne, Trello, EduConverse, etc).

Training would be conducted through a mix method based on role with Canvas and 'role shadowing'.

3. Include some historical background as to how the need for this instructional problem/solution arose.

Onboarding is typically conducted by Continuing Education Operations staff. Over time gaps have developed in the onboarding content as roles have become more complex and cross-functional. As employees have left, knowledge has departed or has been documented in various systems. As employees have onboard, there has been a general rush to have the individual working their role as soon as possible, leaving the new

employee lacking in cross-functional training and knowledge about what others outside of their role in the department do. Specific examples include:

High turnover in the Marketing Manager role

The department has had four different Marketing Managers in four years. Due to the deadline specific nature of the position, the last 3 Marketing Managers did not have a full onboarding process. They had general training from the main University in relation to employment but very little guided training from the department. Each manager with thrust into the role lacking the previous managers knowledge of offered programs, past marketing efforts and departmental undocumented processes.

This causes delays for deploying marketing campaigns, pressure on IT staff to support and train the new staff members and lack of proper prioritization of needed actions. This causes frustration for the new hire, with one leaving in less than 1.5 years and another in less than 6 months.

Lack of cross functional understanding of other employees roles

The registration staff have guided the training process, it is one of the fully documented trainings in the department. It is however lacking a section on the roles and responsibilities of what other employees in the department have. This makes it difficult for new registration staff hires to know who to ask for certain tasks. It also leads to new hires taking on tasks (that are not their responsibility) when more senior employees push work off onto them.

PROJECT SUMMARY

UNC Charlotte Continuing Education offers non-credit educational courses for individuals and employers online and in the Charlotte, NC region. The department of the University currently has 15 staff members performing various roles. Specific staff serve multiple departments in their positions, this includes accounting, human resources, information technology and operations. Every employees has key areas of focus which can be broken down into the following areas:

- Accounting
- Marketing
- Registration
- Operations
- Program Development
- Human Resources
- Information Technology

New employees in the department are responsible for remembering the processes, procedures, policies and related training for their key area of focus in addition to performing their job duties. There is an established basic onboarding process for the department.

The current onboarding progress and its included content is provided by operations with some assistance from focus area employees when available. With the growing complexity and cross-functionality of roles and the department's high employee turnover rates, gaps in the onboarding process have developed.

This has led to frustration with all stakeholders in the onboarding process, as new employees are not always full equipped, current employees are having to take time out of their days to repeat information and perform additional tasks for new hires, slowdowns in production then occurs in the office and students are effects in various ways - from delayed support to dealing with unprepared new hires.

A new onboarding method was identified as a way to prevent many of these current problems from reoccurring for future new hires. Not only would a new process need to be developed but new instructional content would develop when it was missing and out of date content would need to be updated.

After review, it was determined content would need to be designed based on the key area of focus of the new employee, with additional information provided on the other roles in the department, as well as general policies and procedures and benefits. As an additional benefit, the content created for the new onboarding process would also serve as a resource for established employees for reference as well as new hires.

The onboarding areas were then ranked in order of importance and general unit onboarding information was chosen to be implemented and revamped first. The starting portion of this process was establishing a basic foundational knowledge for what Continuing Education does who makes up the unit and some employee basics.

Needs Analysis

UNC Charlotte Continuing Education New Employee Onboarding Process

Comparative Needs

There has been a discrepancy in the amount of time it takes for new hires to be considered fully onboarded. The time varies based on key areas of focus, where some new hires are receiving additional support and training than others.

For example, Registration staff is given one-on-one training with the DestinyOne registration system and job shadowing, where Marketing Managers are given no training at all in relation to the system only login credentials.

Expressed Needs

Employees have requested additional training and/or assistance when they run into issues or find they lack the knowledge or training to complete a task. Information Technology staff has made a digital knowledge base for frequently asked questions and created documentation to assist with the requested needs.

Felt Needs

No formal survey or venue has been provided to collect employee feelings about the current onboarding process. However, Directors have open door policies and have listened to concerns with both new and established employees in relation to process breakdowns and possible solutions.

Anticipated Needs

The Continuing Education department expects to expand and offer additional non-credit programs within the fiscal year as well as undergo a restructuring. With this growth there will also be several new employees in need of training.

There will also be experienced employees retiring, with at least 1 employee set to retire in the next 6 months with an additional 2 in the next 5-10 years.

UNC Charlotte Continuing Education needs to create an effective onboarding process that provides a smooth experience to new hires that not only gets them acclimated and knowledgeable but trains them so they can perform their job duties as soon as possible.

Critical Incident Needs

The department of Continuing Education is part of the University of North Carolina at Charlotte. There are policies and procedures that must be followed per University and State guidelines, these will be included in the onboarding process in addition to departmental responsibilities to crisis situations that may affect employees.

For example, the department is located at UNC Charlotte Center City campus, which is a high rise building and follows a different fire safety procedure.

Actual Performance vs. Optimal Performance

Performance Gap Analysis	
Current Learner Performance	Optimal Learner Performance
New and some established staff are unaware of the duties and responsibilities of other staff members.	100% of learners will know who the other employees in the department are and what job functions they perform in their area of focus.
New and some established staff are unaware of specific policies and procedures that are critical for the department and university.	100% of learners will be introduced to these policies and procedures. They will be given contact information to Legal and Directors for follow up questions.
Certain new hires are missing critical training and guidance.	100% of new hires will be training in their area of focus and given an onboarding mentor.
Only 42% of focus areas have extensive experience with the DestinyOne System in their area of focus.	100% of learners will know the proper way to use DestinyOne in relation to their job duties.*

**This is an end goal for the entire onboarding process, not the first module but is important to note as it is in relation to gap 2 and 3*

Company Performance Gap		
Data Point	Current	Goal
Training or Reference Guides for New Employees	Some documentation (unorganized on the S Drive), some focus areas have the ability for new hires to watch senior employees.	Proper onboarding process for all focus areas that include documented procedures, policies and processes. This includes quick guides, reference materials and assigned mentors for job shadowing that is structured.
Training or Reference Guides for Established Employees	IT's FAQ board in Trello	Creation of a searchable Wiki
Expressed frustrations from new and established employees	<i>still collecting</i>	Improved moral and decrease in complaints, with an ability to measure complaints

Possible Solutions

- Create complete onboard process that takes into account the focus area of the new hire
- Create job aids (based on area of focus) in relation to DestinyOne and any additional software/etc
- Display policy, procedures, process in easy to understand format
- Create training materials for new employees that current employee can reference
 - Create engaging interactive training aids using LMS
 - Demo videos with narration
 - Quizzes that test knowledge
- Assign mentors to new hires, for job shadowing/training and team building
- Provide list of specific department benefits to new hires

Learner Analysis

The learners identified to participate in the onboarding process are new hires with the UNC Charlotte Continuing Education department, the content from the process will also be available for current established employees for reference.

- **Age Group:** All learners are over 18 years of age, making them Adult Learners. There are generational gaps that may need to be taken into account in relation to established and new onboarding employees.
- **Number of Students:** Onboarding is done on a case by case basis, as needed. One learner at a time.
- **Socioeconomic Status of Learners:** Salaries are available for all North Carolina State Employees as public records.
- **Language Proficiency:** All learners will be either native English speakers or have scored high levels on their English proficiency exams.
- **Educational Background:** All learners will have a minimum of a high school diploma. Almost all will have Bachelor's degrees in their roles field, some with Masters and Doctoral degrees.
- **Attitude Toward the Subject of the Instruction:** Some bias may exist in relation to the usefulness of the onboarding training as well as the engagement factor.
- **Pre-knowledge or Skill with the Subject Content:** Some new hires may have already worked for previous departments at UNC Charlotte or other higher education institutes and have participated in similar training.
- **Impairments or Disabilities:** No known current employees with impairments or disabilities. However, accommodations can be made with the services from the Office of Disabilities Services.

Technology Analysis

The onboarding process would include elements for the new hire to complete on their own using an Learning Management System (LMS). For UNC Charlotte Continuing Education they would be using **Canvas** since it would be free and work with the new hires and their managers

NinerNet credentials. The course would be done using a **University provided workstation or laptop**, since it is to be completed during work hours. A **headset** would be provided to listen to any videos that may be included in the training.

- Canvas (LMS)
- Windows workstation or laptop (University provided with employment)
- Headset (University provided with employment)

Contextual Analysis

Orienting Context

In order to properly design the onboarding content the new hires characteristics will need to be taken into account. This includes their personal goals for completing the onboarding process, the perceived utility of onboarding instruction and how they think they will be held accountable for their mastery of the onboarding information since it influences all aspects of their learning experience.

- **Goals:** New hires will be mandated to onboard as a requirement for their position and continued employment. Personal goals could be a factor but may not be present in all.
- **Utility:** In many instances for new incoming employees the onboarding process can be seen as lacking and useless. It would be beneficial to change this perception by creating a process that is not only smooth, useful but provides some sort of entertainment/interactive factor.
- **Accountability:** Laying out a prioritization of what is important for new hires to understand. Presenting required knowledge as learn 'now vs later'.

Instructional Contexts

The onboarding content and process will be presented and available through an LMS (UNC Charlotte's instance of Canvas). Modules will be designed based on the key area of focus and assigned to new employees based on their roles along with general modules for all employees. There will be a progress setup, where certain modules will open/unlock based on completion of others in order to guide new hires.

Transfer Context

Additional training will be conducted through structured 'job shadowing' based on the role with an assigned mentor. Mentors will be provided structured guides in order to teach the new hires necessary skills and to ensure gaps are not formed.

After training is complete, subject experts will be available for additional continual growth in the department - this can be through outside training, courses or conferences.

Unit Goals

- Learner is able to recognize the roles and responsibilities of other employees in the department (Knowledge).
- Learner is able to comprehend the unit processes, procedures and policies in relation to their area of focus in the department (Comprehension).
- Learner is able to locate additional processes, procedures and policies with provided resources (Comprehension).
- Learner is able to apply for specific training they may need in relation to their role ie: security training (Application).

Tasks Analysis

I used data from the IT knowledge base, Operations files and points from the gap analysis to conduct the task analysis. For the first module in the onboarding process the focus would be on basics about the department: the who, what, where and why for specific topics.

Topic Analysis

Content Structure: Facts, Concepts, Procedures

The introductory module will be broken down into “questions” a new hire may internally ask within the LMS. Each “question” addresses facts, concepts and/or procedures of the six structures related to task analysis.

1. [Facts] Who works here and what do they do?
 - a. Help! I need someone to mentor me! Where do I start?
2. [Facts, Concepts] What are the important policies, procedures and processes for the department and university?
3. [Facts, Procedures] What training do I need to sign up for? How do I sign up for training?

Procedural Analysis

Who works here and what do they do?

What does the learner do?

- Read biographies and watch videos on each employee in the department and about Continuing Education. These will include each employee's area of focus, roles, responsibilities in addition to some personal traits, such as favorite lunch restaurants, sports teams and hobbies.

What does the learner need to know to do this step?

- Ability to use a computer and navigate the LMS.
- NinerNet credentials (in order to login to workstation/laptop and the LMS).

What cues inform the learner that there is a problem, the step is done, or a different step is needed?

- **Problem:** If the learner does not know an employee or their role/responsibilities
- **Done:** Learner takes a quiz via the LMS on the employees in the unit and passes with a minimum score of 85%. Learner can retake units if they obtain the minimum score.
- **Different Step:** Learner marks 'Help! I need someone to mentor me! Where do I start?' in the LMS via quiz questions (opening a new module)

What are the important policies, procedures and processes for the department and university?**What does the learner do?**

- Read the provided policies, procedures and processes set forth in the LMS.
- Take note of the listed locations of these documents.
- Understand how the provided policies, procedures and processes relate to their job duties.

What does the learner need to know to do this step?

- Ability to use a computer and navigate the LMS.
- NinerNet credentials (in order to login to workstation/laptop and the LMS).

What cues inform the learner that there is a problem, the step is done, or a different step is needed?

- **Problem:** Learner is unfamiliar with policies, procedures and processes for the department and university.
- **Done:** Learner marks they understand that they understand the policies, procedures and processes for the department and university via a quiz in the LMS.
- **Different Step:** Learner marks need assistance with specific policies, procedures and/or processes via a quiz in the LMS.

What training do I need to sign up for? How do I sign up for training?**What does the learner do?**

- View available training. With specific training based on their role and its priority level.

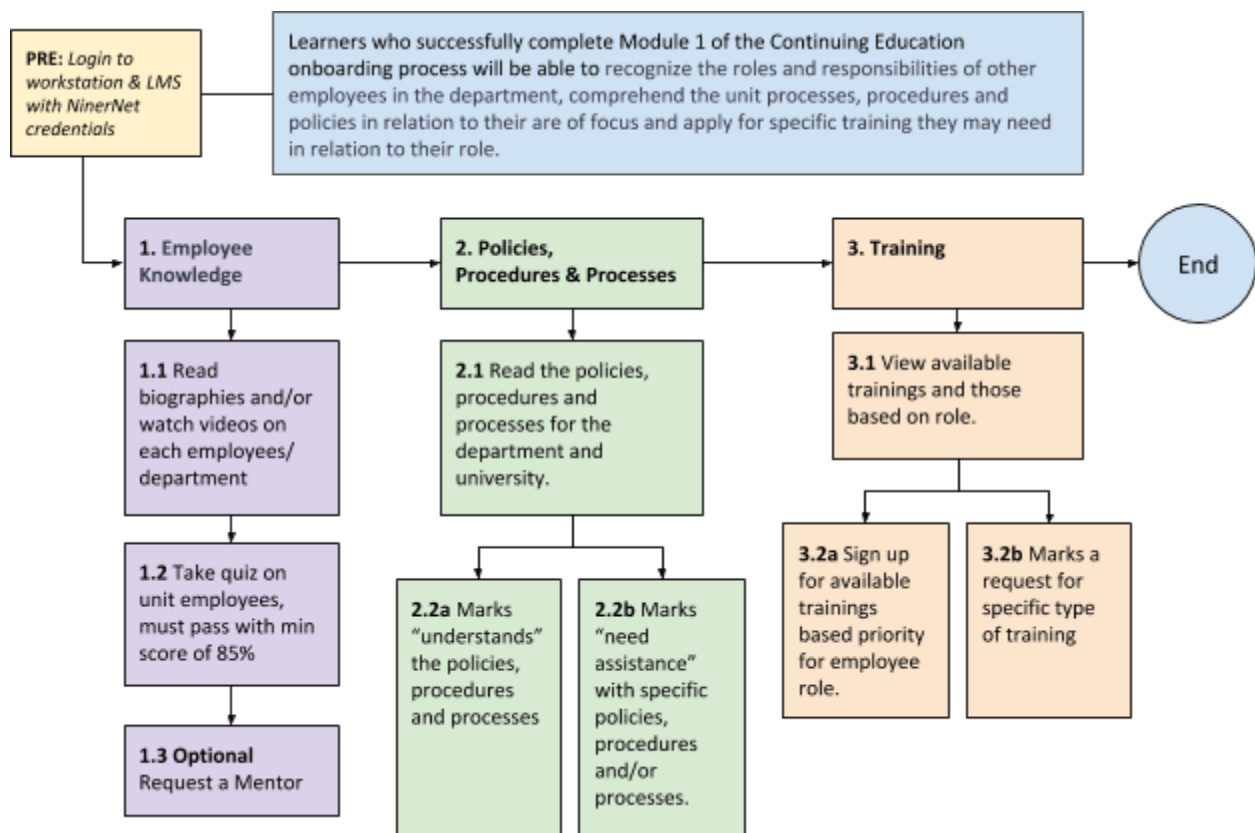
What does the learner need to know to do this step?

- Ability to use a computer and navigate the LMS.
- NinerNet credentials (in order to login to workstation/laptop and the LMS).
- Their Supervisor and/or the roles and responsibilities of other employees, specifically in relation to accounting and IT security.

What cues inform the learner that there is a problem, the step is done, or a different step is needed?

- **Problem:** The learner is unaware of what training they need to take, what training is available and how to sign up for training.
- **Done:** Learner successfully is able to sign up for necessary high priority training, and has the knowledge to sign up for additional low priority training at a later date. Learner marks that they have signed up for specific types of training 'complete' via a quiz in the LMS.
- **Different Step:** User marks a request for permission to sign up for a specific type of training that requires signature authority via a quiz in the LMS.

Task Analysis Flow Chart



Instructional Objectives

The training for this Module 1 of the new employee training process for the UNC Charlotte Continuing Education department. By the end of training of Module 1 in the Continuing Education onboarding process, the new hire learner will be able to:

- **Identify** other Continuing Education departmental employees, their job area of focus and general duties (Remembering)
- **Locate** the policies, procedures and processes for the department and the University for

reference (Remembering)

- **Apply** what they have learned from the policies, procedures and processes to how they perform their job duties (Applying)
- **Sign up for (or place a request for)** specific training that is a priority per their jobs focus area (Applying).

All goals will be completed with 100% accuracy.

INSTRUCTIONAL OBJECTIVES

By the end of training of Module 1 in the Continuing Education onboarding process, the new hire learner will be able to:

- Identify other Continuing Education departmental employees, their job area of focus and general duties (*Cognitive Domain - Remembering*).
- Locate the policies, procedures and processes for the department and the University for reference (*Cognitive Domain - Remembering*).
- Apply what they have learned from the policies, procedures and processes to how they perform their job duties (*Cognitive Domain - Applying*).
- Sign up for (or place a request for) specific training that is a priority for their jobs focus area (*Cognitive Domain - Applying*).

Learners will complete Module 1 of the onboarding process by obtaining departmental and university critical knowledge (*Affective Domain - Receiving*) then via the Canvas LMS and learners will apply what they have learned by taking quizzes at specific stages (*Affective Domain - Responding*). In order to successfully complete the module they must pass with a minimum score of 85%.

Sequencing Description

The onboarding of new employees via the new process and training will be using the **Learning-Related Sequence**. As there are identifiable prerequisites the learner, new hire, must master before completing a more difficult task (Morrison et al., 2013). This is the primary method used for Module 1 of the onboarding process, where the module includes knowledge items the new employee must learn, such job roles of current employees, departmental processes, procedures and policies in addition to training.

The learner, new hire, would need to master the current knowledge set before moving onto more difficult materials and then tasks and very appropriate with new/notice learners (Morrison, et al., 2013).

Module 1 Sequence

Sequence	Description	Time	Objective	Justification
1a	Direct Instruction Learner will read provided biographies and/or watch videos on each employees within the department	15 mins		Knowledge about other staff members is important for new hires to know who is the subject matter expert for specific important items. Also opens options for possible mentoring.

1b	Summative Assessment Quiz on Staff Members via Canvas, learner must score 85% or higher to move on to next step.	5 mins	1a	Testing learners knowledge and understanding on staff members duties in the departments
1c	OPTIONAL Interactive Activity User has the option to select a mentor from their area of focus.	3 mins	1a & 1b	Teams senior employees with new hires wanting guidance to facilitate legacy knowledge outside of the normal onboarding and training process
2a	Direct Instruction Learner will be provided the necessary policies, procedures and processes for the department and university for review/reading in addition to reference them during their job duties. This includes specific ones per area of focus.	15 mins + self study		Learner needs to be aware of specific items that impact them and their duties and where to reference them.
2b	Interactive Activity User has the option to select if they “understand” the policies, procedures and processes or if they “need assistance” with specific policies, procedures and/or processes.	5 mins	2a	Goal is not to test the actual knowledge of the employee via a quiz, instead if they need assistance or can reference the necessary items when they encounter them on the job.
3a	Direct Instruction View available training and those based on role. This can be documents, videos, etc based on the area of focus.* <i>*Also include job shadowing for specific roles.</i>	15 mins + self study		Present learner will need training materials and sessions. Learner will attend sessions based on availability and self study during work hours. This is necessary to get new hire trained for their role.
3b	Interactive Activity Sign up for available training based priority for employee roles or make a request for a specific type of training.	5 mins	3a	New hires will sign up for necessary training based on priority to their roles. If an employee needs a training not listed, i.e. they want to suggest one, they may do so here also so their schedule can be adjusted.

Training time total 60 mins with additional 3 mins for optional activity, does not include self study time.

Instructional Message

Strategy	Function	Content Structure	Learner	Task Attributes
Objectives	Learners will be informed of expectations at the beginning of each training segment, stated via objectives.	Objectives will be stated in Canvas before each segment via text. Video elements with narration may also be available at the beginning and end of the training session.	Learners are adults with min of q High School diploma. Learners are UNC Charlotte employees.	Training is for new hires but available to current employees who wish to reference materials. Training is broken into modules, this analysis is for Module 1.
Overview	Provide a summary of what content the learner will be exposed to within the segment.	Summary of how the content is related to the new hire process and area of focus if necessary, and how it relates to their job duties.	Learners are adults with min of q High School diploma. Learners are UNC Charlotte employees.	Learners will be trained via segments in Canvas on necessary content for their jobs.

Strategies Table

Procedure	Strategy	Initial Presentation and Generative Strategy
Employee Knowledge		
Prepare new hires with areas of focus of current departmental employees.	Demonstration, Recall	Learner will read provided biographies and/or watch videos on each employee within the department.
Policies, Procedures & Processes		
Organize necessary documents per area of focus for new hires.	Organization, Recall, Practice	Locate the policies, procedures and processes for the department and the University for reference. Learns will apply what they have learned from the policies, procedures and processes to how they perform their job duties.
Training		
Provide learners with what training is needed per their area of focus.	Organization, Practice	Learners will view available training and those based on role then sign up for available training based priority for employee role.

Text Design

General Design

Materials designed for the onboarding training will be digital in nature. The instructional message for each task will be written in text - which is clearly visual with decorative text formatting such as bulleted or numbered lists, and marked with heading tags.

Style Guide

Consistent styling will be used for each module and segment, following and being compliant with [UNC Charlotte brand standards and style guides](#).

Video

Narration will be included for videos that may not necessarily be displayed on screen.

Closed Caption will be available at a later date for video, once more resources become available. This is not just in consideration for the development of ADA compliant videos but for learners who prefer visual to auditory signals.

Graphics and Iconography

The use of graphics will at times include text, with alt-tags.

Icons will be used for signally specific messages, such as alerts, warnings, etc.

Multimedia Design

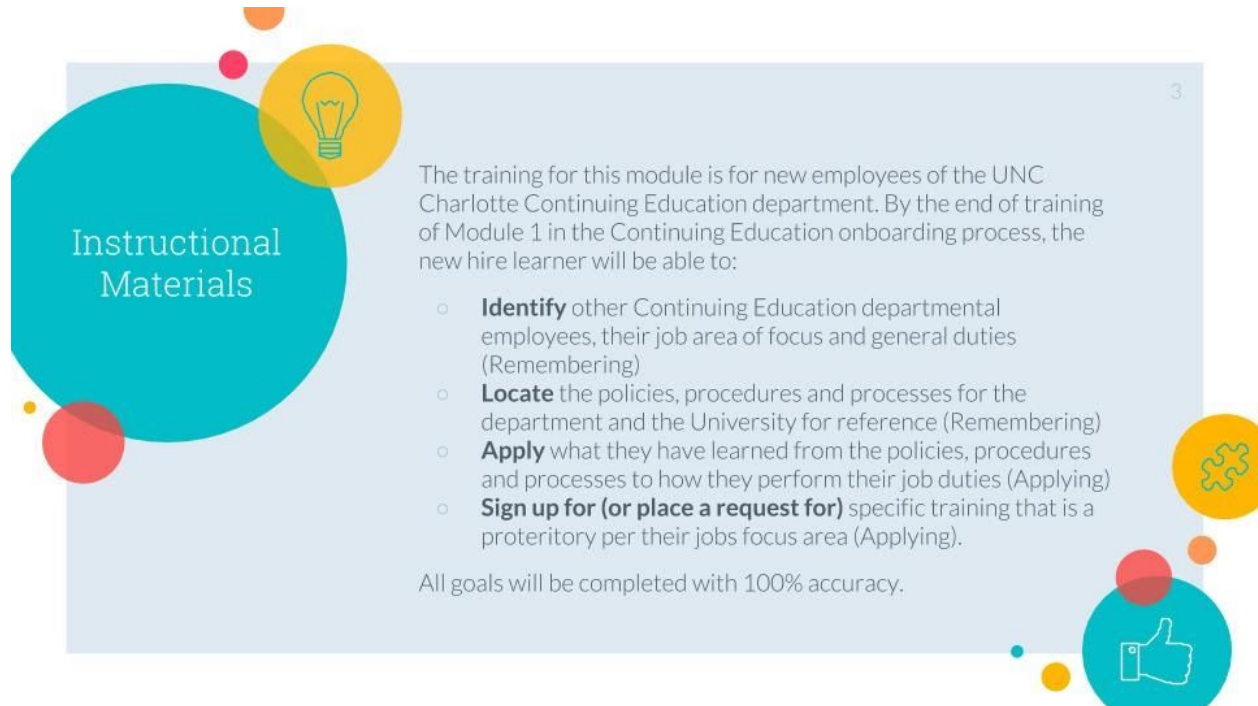
The Continuing Education departments onboarding training process will be a mix of multimedia formats and hands-on training. However, each module will originate in Canvas, which will house all created training materials and quizzes aside from any materials that are obtained through job shadowing. Messaging will be allowed with specific staff members via Canvas, however communications will be encouraged to take place with University email.

Adobe products will be used to create multimedia elements, videos will be created via Adobe Spark and graphics with Adobe Photoshop and Illustrator.

Documents will be provided via Google Docs or accessible PDFs when created by the departments. Materials that are referenced will normally be web links, such as University Legal policies. As such all materials will take into account the learners ability to interpret the presented information in attention to design.

DEVELOPMENT

Instructional Materials



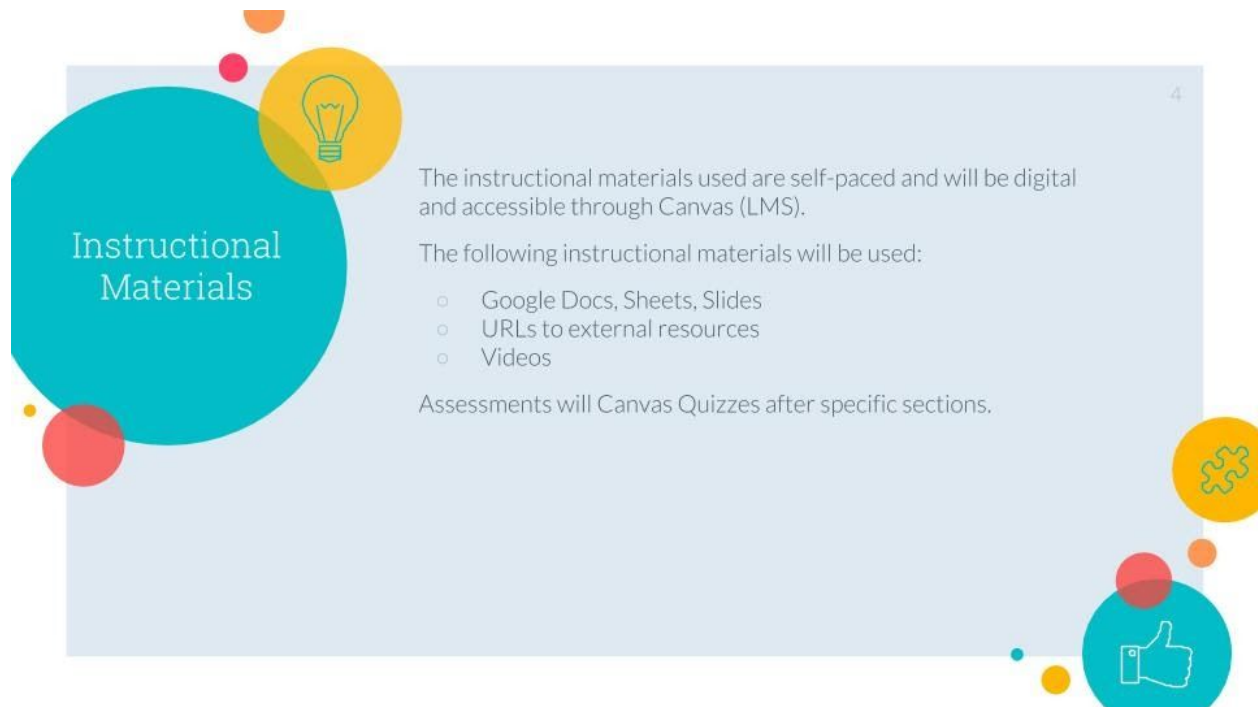
Slide 3 features a light blue background with a large teal circle on the left containing the text "Instructional Materials". To the right of this circle is a yellow circle with a lightbulb icon. The main text area on the right contains a paragraph and a bulleted list. Decorative elements include a red circle, a yellow circle with a puzzle piece icon, and a blue circle with a thumbs up icon in the bottom right corner.

3

The training for this module is for new employees of the UNC Charlotte Continuing Education department. By the end of training of Module 1 in the Continuing Education onboarding process, the new hire learner will be able to:

- **Identify** other Continuing Education departmental employees, their job area of focus and general duties (Remembering)
- **Locate** the policies, procedures and processes for the department and the University for reference (Remembering)
- **Apply** what they have learned from the policies, procedures and processes to how they perform their job duties (Applying)
- **Sign up for (or place a request for)** specific training that is a prerogative per their jobs focus area (Applying).

All goals will be completed with 100% accuracy.



Slide 4 features a light blue background with a large teal circle on the left containing the text "Instructional Materials". To the right of this circle is a yellow circle with a lightbulb icon. The main text area on the right contains a paragraph, a sentence, and a bulleted list. Decorative elements include a red circle, a yellow circle with a puzzle piece icon, and a blue circle with a thumbs up icon in the bottom right corner.

4

The instructional materials used are self-paced and will be digital and accessible through Canvas (LMS).

The following instructional materials will be used:

- Google Docs, Sheets, Slides
- URLs to external resources
- Videos

Assessments will Canvas Quizzes after specific sections.



5

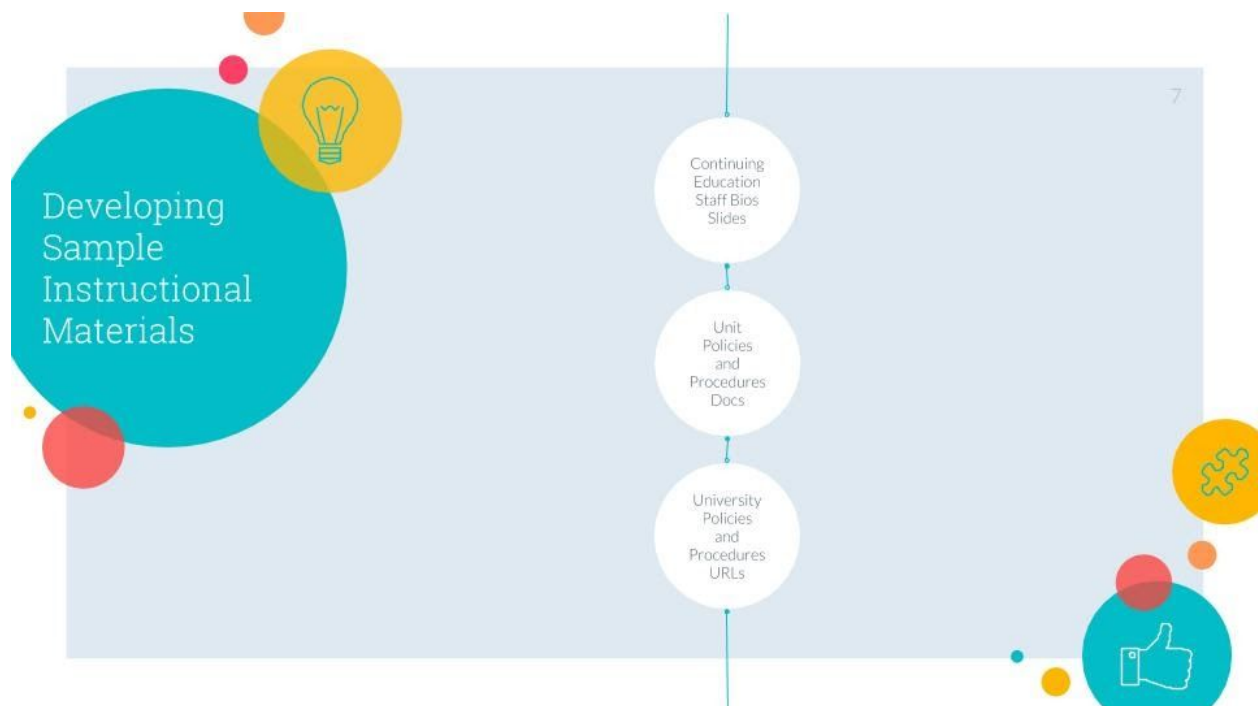
Google slides will be used to introduce new hires to the current Continuing Education staff, they will include their biographies, a photo and the staff members area of focus. Videos from staff members will be included when available. With the access controlled available and easy to update format, Slides will be used to ensure each staff 'slide' is up to date and holds needed information and new content.

Google docs and/or sheets will hold unit policies and procedures for new hires to become familiar with. The unit already stores its documents in G-Suite, using the current resources ensures materials are up to date and accessible.

External URLs will reference University policies and procedures for new hires to become familiar with. The University maintains these external web pages, linking directly to the source ensures training materials are up to date as possible.



Developing Sample Instructional Materials



8

Intro to CE

How to Accelerate Your Career with Stackable Credentials

Introduces Learners to the unit before the staff bios start

<https://www.youtube.com/watch?v=kqwcmb-Y4iM>

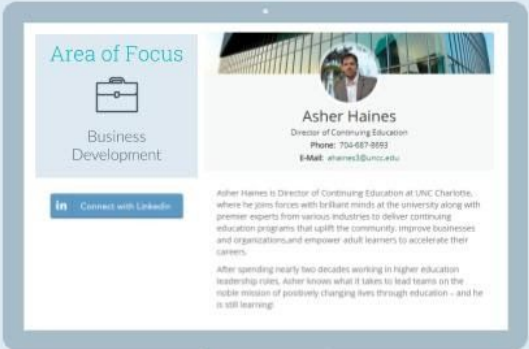


Slide 1: Intro to Continuing Education

9

Staff Slides

Learner will read biographies and/or watch videos on each current employee within the department.



Slide: 2 Staff Biographies Example

10

Staff Quiz

New Hire will be answer questions based on what they learned in the section on specific staff members and their roles.



Unit Staff Quiz

1. Which Program Director handles the Business Analytics Certificate program?
2. Who updates the website?
3. Who works on the Full Staff Certificate Program?
☐ Amy
☐ Sam
☐ Karri
☐ Janeene
☐ Margaret

Unit Staff Assessment
example

11

Unit Google Docs

Learner will be provided the policies, procedures and processes for the department for review/reading.



Unit Policies and Procedures

- Business
 - [Professional Development](#)
 - [Partnership Programs](#)
 - [Lender Agreements](#)
- Marketing
 - [Email Marketing Process](#)
- Technology
 - [Email Signature](#)
 - [Staff Computing and Electronic Communications](#)
 - [Web Communications](#)

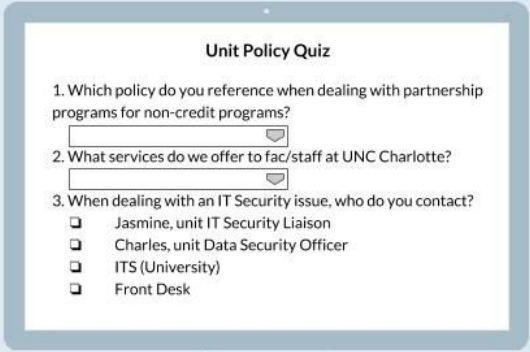
Links to Google Doc

Unit Policy and Procedures
example, links not live

12

Unit Policy Quiz

New Hire will be answer questions based on what they learned in the section on unit policies and procedures.



Unit Policy Quiz

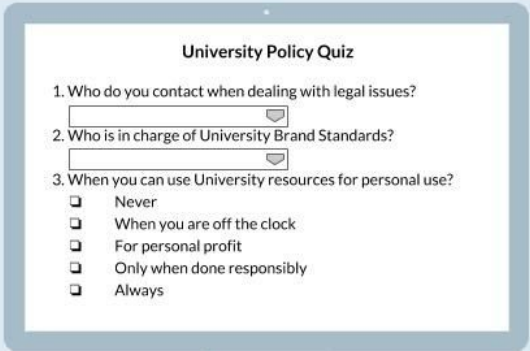
1. Which policy do you reference when dealing with partnership programs for non-credit programs?
2. What services do we offer to fac/staff at UNC Charlotte?
3. When dealing with an IT Security issue, who do you contact?
☐ Jasmine, unit IT Security Liaison
☐ Charles, unit Data Security Officer
☐ ITS (University)
☐ Front Desk

Unit Staff Assessment
example

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University Policy Quiz

New Hire will be answer questions based on what they learned in the section on the University policies and procedures.



University Policy Quiz

1. Who do you contact when dealing with legal issues?
2. Who is in charge of University Brand Standards?
3. When you can use University resources for personal use?
☐ Never
☐ When you are off the clock
☐ For personal profit
☐ Only when done responsibly
☐ Always

University Staff Assessment
example

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University External Links

Learner will be provided the policies, procedures and processes for the University for review/reading.



Unit Policies and Procedures

- Marketing
 - [University Advancement](#)
 - [Brand Standards](#)
- Legal and Technology
 - [Information Technology Services](#)
 - [Security Compliance](#)
 - [Legal Affairs](#)
 - [University Policies](#)
 - [Policy Owners](#)

Links

University Policy and Procedures
example, links not live

Delivery Methodology

This specific new hire training uses an individual self paced method.

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Delivery Methodology

Strengths

- Both slow and fast learners can complete the training at their pace
- Promotes self-reliance and personal responsibility which is vital to an employees role in the unit
- Instructor and subject matter experts can give attention when necessary based on the new hires area of focus
- Training remains consistent, which addresses a major concern for the unit

Morrison, et. al (2013), page 208



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Delivery Methodology

Details

- Controls the step size throughout the instruction (pg. 191) and allows for specifics cues (pg. 193).
- Allows for the development of activities to address specific objectives (pg. 208).
- Can check the mastery of the learners knowledge before they can proceed (pg. 208).
- The new hire receives immediate feedback from quizzes (pg. 208).
- The ability to obtain additional help is available when necessary for the new hire (pg. 208).

Morrison, et. al (2013)



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Delivery Methodology

Limitations

- Lack of connection between instructor and learner, if this is the sole method of instruction
 - *It is not, it will be paired with job shadowing with optional access to a mentor*
- If it is a single path it can become monotonous
 - *The plan is to break up the Module into sections*
- Lack of self discipline could lead to procrastination
 - *This could be an issue and will be part of the whole onboarding process, with possible 'check ins' from the hiring manager*

Morrison, et. al (2013), page 208



IMPLEMENTATION

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ABOUT THIS GUIDE

This instructional guide provides implementation information for the UNC Charlotte Continuing Education New Hire Onboarding Process. It includes four sections, unit overview which provides background in the Continuing Education department, instructional needs related to the new hire onboarding process, and a learner analysis; pre-planning, which provided information on preparing new hires for onboarding training, what is required of them, how they are grouped and how they are prepped; the instructional environment, equipment and materials, this includes canvas and other university provided resources, and how the training will be assessed.

Section One: Unit Overview

Unit Introduction and Organization

UNC Charlotte Continuing Education offers non-credit educational courses for individuals and employers online and in the Charlotte, NC regional area. The department currently has 15 staff members performing various roles with specific staff members serving multiple departments in their positions. This includes accounting, human resources, information technology and operations. Every employees has key areas of focus which can be broken down into the following areas:

- Accounting
- Marketing
- Registration
- Operations
- Program Development
- Human Resources
- Information Technology

New employees in the department are responsible for remembering the processes, procedures, policies and related training for their key area of focus in addition to performing their job duties. There is an established basic onboarding process for the department.

The current onboarding progress and its included content is provided by operations with some assistance from focus area employees when available. With the growing complexity and cross-functionality of roles and the department's high employee turnover rates, gaps in the onboarding process have developed.

Instructional Needs

The issues with the current onboarding process has led to frustration with all stakeholders, as new employees are not always full equipped, current employees are having to take time out of their days to repeat information and perform additional tasks for new hires, slowdowns in production then occurs in the office and students are effects in various ways - from delayed support to dealing with unprepared new hires.

A new onboarding method was identified as a way to prevent many of these current problems from reoccurring for future new hires. It was determined content would need to be designed based on the key area of focus of the new employee, with additional information provided on the other roles in the department, as well as general policies and procedures and benefits. As an additional benefit, the content created for the new onboarding process would also serve as a resource for established employees for reference as well as new hires.

The onboarding areas were then ranked in order of importance and general unit onboarding information was chosen to be implemented and revamped first. The starting portion of this process was establishing a basic foundational knowledge for what Continuing Education does who makes up the unit and some employee basics.

Training Goals and Objectives

The training for this Module 1 of the new employee training process for the UNC Charlotte Continuing Education department. By the end of training of Module 1 in the Continuing Education onboarding process, the new hire learner will be able to:

- **Identify** other Continuing Education departmental employees, their job area of focus and general duties (Remembering)
- **Locate** the policies, procedures and processes for the department and the University for reference (Remembering)
- **Apply** what they have learned from the policies, procedures and processes to how they perform their job duties (Applying)
- **Sign up for (or place a request for)** specific training that is a proteritory per their jobs focus area (Applying).

All goals will be completed with 100% accuracy.

Learner Analysis

The learners identified to participate in the onboarding process are new hires with the UNC Charlotte Continuing Education department. The training Module 1 will also be available for current established employees for reference.

- **Age Group:** All learners are over 18 years of age, making them Adult Learners. There are generational gaps that may need to be taken into account in relation to established and new onboarding employees.
- **Number of Students:** Onboarding is done on a case by case basis, as needed. One learner at a time.
- **Socioeconomic Status of Learners:** Salaries are available for all North Carolina State Employees as public records.
- **Language Proficiency:** All learners will be either native English speakers or have scored high levels on their English proficiency exams.
- **Educational Background:** All learners will have a minimum of a high school diploma. Almost all will have Bachelor's degrees in their roles field, some with Masters and Doctoral degrees.
- **Attitude Toward the Subject of the Instruction:** Some bias may exist in relation to the usefulness of the onboarding training as well as the engagement factor.
- **Pre-knowledge or Skill with the Subject Content:** Some new hires may have already work for previous departments at UNC Charlotte or other higher education institutes and have participated in similar training.
- **Impairments or Disabilities:** No know current employees with impairments or disabilities. However, accommodations can be made with the services from the Office of Disabilities Services.

Section Two: Pre-workshop Planning

Preparing Participants

The **unit hiring manager** will work with **unit technology staff** to prepare new employees for the onboarding training by providing:

- access to the Canvas module with their NinerNet credentials.
- University **provided a workstation or laptop.**
- a **headset** to listen to any videos that may be included in the training.

Participant Prerequisites

Participants are expected to have a high level of confidence and skill in relation to computer use, as it is a part of their job description for hire in the department. New hires will all have at minimum a basic understanding of computer programs and internet usage.

Student Groupings

For the training, students will be grouped based on their positions *Area of Focus*. As they complete the training module, additional training will become accessible based on their needs (position and individual) and access to mentors.

Groups are broken down as:

- | | |
|----------------|--------------------------|
| ● Accounting | ● Program Development |
| ● Marketing | ● Human Resources |
| ● Registration | ● Information Technology |
| ● Operations | |

Giving participants advance information

With a majority of training being done online (with a computer) and self based, participants will meet with their managers prior to training. Hiring managers will identify what content needs to be completed based on departmental needs and if there are specific timelines for modules to the new hire.

Section Three: Instructional Environment, Equipment, And Materials

Preparing the Delivery Environment

The main portion of the onboarding process training, and specifically Module 1 will be conducted with the Canvas learning management system. New hires will complete the training during their scheduled working hours at their desks with their provided workstation (or laptop). Access to the canvas new hire training course will be made available after the new hire onboarding meeting with their management has taken place by IT and the hiring manager.

Equipment and materials

Provided specifically for training

- Access to Canvas Continuing Education New Hire Training Module
- Headset
- Optional access to Mentors (within Area of Focus)

Provided as a requirement for job

- Personal workspace
- Workstation or Laptop
- Keyboard (optional for laptop users) and Mouse
- Mousepad
- Secure internet connection
 - CAT5 Line and Wireless
- NinerNet Credentials
- UNC Charlotte Email Account
- Access to University Google Suite, Shared Drives
- Access to IT Support (unit and main University)

Handouts and media support

No physical handouts will be provided. New hires will receive an email, through their University provided account, once their access to the canvas training course has been granted. They will also be emailed instructions on how to access canvas and the training course.

Section Four: Assessment Of Learning

The UNC Charlotte Continuing Education new hire onboarding training uses the **Learning-Related Sequence**. As there are identifiable prerequisites the learner, new hire, must master before completing a more difficult task (Morrison et al., 2013). This is the primary methods used for Module 1 of the onboarding process, where the module includes knowledge items the new employee must learn, such job roles of current employees, departmental processes, procedures and policies in addition to training.

The learner, new hire, would need to master the current knowledge set before moving onto more difficult materials and then tasks and very appropriate with new/notice learners (Morrison, et al., 2013).

Pre-assessment strategies

Meeting with Managers and Stakeholders

- New hires meet with their managers to identify what skills a new hire is lacking and set a priority for training specific skills if needed
 - Specific skills sets will be known based on resumes from hiring
- New hires will meet with specific stakeholder based on their area of focus for additional requirements (IT for security, Accounting for P-Card training, etc)

Survey on Motivation and Method Attitude

A survey (google survey) will be emailed to the new hire to determine their motivation and attitude to the onboarding training and platform. Questions would include:

- What do you feel would help you be successful at your job?
- What resources were not provided to you at your last job that made it difficult for you to do your job?
- How do you feel about changes?
- Do you like using new technology?
- How have you done formal onboarding in the past?
 - What method was used?
 - What did you take away from it?
 - What did you like most about it?
 - What did you like least about it?

Formative Assessment Strategies

Instructional materials will be provided through Canvas to new hires for self paced learning. In order to receive data as students are progressing through the module inside the LMS 'assignments' will be attached to specific sections.

These 'assignments' would be a range of activities for the learner to complete:

- Take a screenshot of the University Branding Web Standard page and upload it here.
- Identify which logos are using CORRECT brand standards (showing an image of several unit logos).
- Share a document with a co-worker on the team, and document it here

Summative Assessments

In order to test the learner on their knowledge and understanding after each section assigned canvas quizzes will be used. Quizzes will include, single choice, multiple choice, true and false, and short answer questions. Sample Canvas Section Quiz:

University Policy Quiz

1. Who do you contact when dealing with legal issues?

2. Who is in charge of University Brand Standards?

3. When you can use University resources for personal use?

- ☐ Never
- ☐ When you are off the clock
- ☐ For personal profit
- ☐ Only when done responsibly
- ☐ Always

Once a learner has successfully answered the quiz with 100% accuracy, the next section will unlock. If all sections are complete the module is finished.

EVALUATION PROCESS

Before Instruction (Pre Assessment Strategies)

Former New Hire Interviews

Before the training was designed interviews with former department new hires were conducted. This was done to gather the initial opinion of the current process and to identify gaps, as some new hires had little to no onboarding training.

Since these employees will also be taking the training, it is important to gather their experience separate from new employees who come in after the implementation. Interviews were conducted one-on-one during business hours at employees availability. Sample Interview Questions:

- Were you offered any departmental training?
- In what method did you receive training on department procedures?
- Did that training met your initial needs?
 - If not, where did you go for additional resources?
- What aspects of your training were most helpful for your role?
- Were you offered job shadowing opportunities and/or mentors?

Meeting with Managers and Stakeholders

- Prior to taking the training new hires will meet with their managers to identify what skills a new hire is lacking and set a priority for training specific skills if needed
 - Specific skills sets will be known based on resumes from hiring
- New hires will meet with specific stakeholder based on their area of focus for additional requirements (IT for security, Accounting for P-Card training, etc)
- From here additional units in the training maybe assigned

Survey on Motivation and Method Attitude

A pre assessment Google Survey will be sent out via departmental email to new hires to determine their motivation and attitude to the onboarding training and platform. Sample Survey Questions:

- What do you feel would help you be successful at your job?
- What resources were not provided to you at your last job that made it difficult for you to do your job?
- How do you feel about changes?
- Do you like using new technology?
- How have you done formal onboarding in the past?
 - What method was used?
 - What did you take away from it?
 - What did you like most about it?
 - What did you like least about it?

Objective Test on University Procedures and Policies

A pre assessment Google Survey will be sent out via departmental email that consists of questions specific to an employees Area of Focus as well as general departmental questions. It includes 5 questions that are multiple choice.

Sample General w/ Accounting Area of Focus Questions:

- What position in the department is responsible for website maintenance and updates?
- When does the UNC Charlotte fiscal year start?
- Who is the current Director of Operations?
- Where can you find information on travel reimbursement?

During Instruction (Formative Assessment Strategies)

Module Assignments

Training will be conducted through Canvas for self paced learning. In order to receive data as students are progressing through the module inside the LMS 'assignments' will be attached to specific sections.

These 'assignments' would be a range of activities for the learner to complete:

- Take a screenshot of the University Branding Web Standard page and upload it here.
- Identify which logos are using CORRECT brand standards (showing an image of several unit logos).
- Share a document with a co-worker on the team, and document it here.
- Identify where the printer driver is on the S drive. Document the URL here.

The goal is to see how the learner is able to apply the concepts in which they are tasked with understanding.

After Instruction (Summative Assessment Strategies)

Canvas Quizzes

In order to test the learner on their knowledge and understanding after each section assigned canvas quizzes will be used. Quizzes will include, single choice, multiple choice, true and false, and short answer questions.

Once a learner has successfully answered the quiz with 100% accuracy, the next section will unlock. If all sections are complete the module is finished.

University Policy Quiz

1. Who do you contact when dealing with legal issues?
2. Who is in charge of University Brand Standards?
3. When can you use University resources for personal use?
 - ☐ Never
 - ☐ When you are off the clock
 - ☐ For personal profit
 - ☐ Only when done responsibly
 - ☐ Always

Sample Canvas Section Quiz

ALIGNMENT OF UNIT GOALS TO THE EVALUATION PROCESS

Goal or Learning Objective	Evaluation Method
Identify other Continuing Education departmental employees, their job area of focus and general duties (Remembering)*	● Pre-Assessment to Post-Assessment comparison.
Locate the policies, procedures and processes for the department and the University for reference (Remembering)*	● Pre-Assessment to Post-Assessment comparison. ● Long-Term Assessment using learners manager for data collection.
Apply what they have learned from the policies, procedures and processes to how they perform their job duties (Applying)*	● Pre-Assessment to Post-Assessment comparison. ● Long-Term Assessment using learners manager for data collection.
Sign up for (or place a request for) specific training that is a proteritory per their jobs focus area (Applying).	● Pre-Assessment to Post-Assessment comparison.
Evaluation Design Justification ● The pre assessment attitudes survey was conducted for training betterment. ● The evaluation process was designed to track new hire learning throughout the self paced training (formative) and at the completion of the training (summative). The pre assessments were created to establish data on learners prior to training in regards to departmental procedures, policies and personnel to determine the productivity of the training materials and design. ● The new hires manager will be gathering data for the long-term assessment which will help determine the effects of the training in the learners job duties.	

*All goals will be completed with 100% accuracy.

FORMATIVE EVALUATION

Two learners tested the learning module using paper and digital prototypes.

1. University employee who was not a departmental employee to stand in as possible “new hire”.
2. Established Continuing Education employee who was not offered formal onboarding training.

	UNC Charlotte Employee	CE Employee
Pre Assessment Score	45%	100%
Post Assessment Score	100%	100%
Post Training Learner Survey	• Easy to use • A lot of “looking up information” • More explanation needed for <i>why</i> the department does something a specific way • Bios with pictures is great, wants more videos	• Easy to follow • Boring for est. employee but good refresher • Very basic information • Should include more sections on some of the harder processes • Had issues with lack of access to other areas of focus
Analysis of Evaluation	Reason for selection: • Simulating a “new hire” that has gone through University training but yet to go through the departments onboarding process. • Access and availability Survey reveal training was helpful for learners unfamiliar with unit specific procedures and policies.	Reason for selection: • Able to assist in a post gap analysis, attitude survey and availability Surveys reveal attitudes with lack of initial formal onboarding process and issues with that lack of training. The suggestion for harder processes is good. It should be addressed, however given complexity it may need to be in another unit.

	Wording on some specific questions was hard to understand. Liked how each section would “unlock” only after 100% completion. Making sure the learner completed the section correctly before moving on.	Felt training was beneficial for established employees as a refresher but should not be mandatory unless assigned by a manager due to specific issues with policies/etc. Wanted to access information provided to other areas of focus, recommend ‘cross training’ options for established employees.
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Post Evaluation Training Changes

- Create additional instructional videos per section.
- Fix the wording on specific questions by working with Area of Focus leaders.
- The possible addition of policy and procedures implementation history, will need to work with management on the benefit to not only new hires but audits.

Out of Scope: Established Employee Suggestions

Where great suggestion, they are out of scope for the new hire onboarding process and should be moved to a different project/process.

- Create a separate module for established employees to take a refresher on policies, instead of taking the “new hire” training.
- Cross training established employees in other areas of focus.