ONBOARDING FOR SUCCESS:

A midstream evaluation of strategic onboarding at Portland State University

FINAL REPORT

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Introduction

A new strategic direction

Portland State University (PSU) is Oregon's largest university and houses a large and diverse set of faculty, staff, and administrators. With such a large population and a constantly changing landscape of budgets and institutional requirements, Portland State is continually hiring, developing, and transitioning its workforce. Studies in the last decade have shown that by focusing on the onboarding process, retention and job effectiveness can be significantly enhanced. [1] In the summer of 2012, under the direction of the Vice President of Finance and Administration, a Strategic Onboarding committee was formed to evaluate existing processes and make recommendations on implementing a formal onboarding process for the institution. In August of 2012, a formal proposal for deliverables was formulated and three phases of implementation defined. By December of the same year, the majority of phase 1 deliverables were completed and outreach had begun. As part of the evaluation of the enhanced processes, a survey was conducted to individuals "onboarded" between July 2012 and July 2013. In this report, we will discuss the key elements of a successful onboarding program from existing literature and compare that against the deliverables of Portland State's strategic onboarding efforts. An analysis of the survey data will provide clues as to the effectiveness of the program as well as show possible weaknesses and areas for improvement as the committee's charge is completed in the active and upcoming phases.

Existing systems prove inadequate

One of the initial findings of the committee were the elements of an effective onboarding system existed, but were not implemented in a consistent and repeatable fashion. [2] Human Resources conducted fairly typical employee orientations sessions and the remaining elements of onboarding were left to departmental managers, a widely distributed population with varying resources and instruments for such a task. Another large gap in the onboarding process was the lack of automation and integration in many of the IT systems. These systems are utilized by human resources and the departments to provide new employees a consistent experience starting with the hiring process, through their first days on the job. In some cases, access to specific IT systems took an extensive amount of time to provision, slowing startup time and reducing employee effectiveness out of the gate. The third major component in the committee's findings involved discrepancies in new hire checklists and related new employee documentation. These instruments were inadequate, unprofessional, and dispersed.

Expert help to the rescue

Lucky for Portland State, a leading researcher in leadership, selection, new employee socialization, and onboarding was readily available: Dr. Talya Bauer. Dr. Bauer is the Gerry & Marilyn Cameron Professor of Management in Portland State's School of Business Administration and an Affiliate Faculty Member to the Psychology department. She presented some key concepts of a successful onboarding program and suggested reference materials and guidelines to provide a starting framework for the committee's charge. A thorough literature review and Dr. Bauer's guidance led to the compilation of a set of deliverables to move from a more informal onboarding program, to a formal onboarding program that creates a structured approach, cross-institutionally, for new employees. [1] The committee formulated that creating "an onboarding program that provides a uniform experience for all new hires; balances compliance with compassion while recognizing the diversity of employee types" was to be created while attempting to meet several key objectives: [2]

1. Facilitate a new employee's ability to contribute to the University as quickly as possible by providing them with the logistical support they need to be productive from day one.

2. Provide new employees with a comprehensive understanding of the University's organization, history, terminology, and norms.
3. Welcome new employees into the PSU culture, encouraging engagement with, and commitment to, the University.
4. Help increase new employee retention rates.

The deliverables

These objectives and existing systems were evaluated and specific deliverables teased out. These deliverables were split into three phases to be completed over the following year. The Table 1 shows the initial deliverables, of which phase one is complete and significant progress has been made in phase two.

Table 1: Onboarding phases and descriptions. [2]

PHASE 1	CHECKLISTS AND INFORMATION PACKETS
Reformat HR website	Include "New Employee Information" section. Make forms easier to find.
Update New Employee website	Organize information to when its needed (1st day, 1st week, 1st month).
Welcome Letter with Letter of Offer	Include directions for first day, where to go, who their first day contact is, where important info is, what to do *before* their first day, etc.
Manager & Employee checklists	Checklists for new employees and managers to assist in compliance.
Departmental Welcome Packet	List of services around campus, org chart, campus map, acronym guide, dress code, departmental contact list, sign-up reminders.
PHASE 2	AUTOMATION AND OUTREACH
President's Welcome Letter	Create a friendly "welcome to PSU" email from the president.
Automated onboarding emails	Send a set of automated, timely messages with resources during employees onboarding period.
History of PSU video	Develop a video showing the history and background of PSU.
Automate IT system access	Create automatic provisioning of IT systems access based on position.
PHASE 3	AUTOMATION AND COMMUNICATION
Revamp New Employee Briefing	Shorten and enhance briefing. Provide lengthy content through online videos or separate training sessions offered by HR.
Create New Employee Handbook	A comprehensive reference guide for new employees. Print employee handbook.
"Quick accept" process	Allow provisioning of IT systems access prior to first day of employment.
Electronic *Letter of Offer*	Provide for electronic delivery of Letter of Offer instead of paper letters along with an electronic signature system for accepting offer.
Online benefits signup	Create procedure to sign up for benefits prior to first day.
Communications plan	Continued execution of the delivery of updates about onboarding systems.

Literature Review

Organizational socialization

The term onboarding was founded in the assimilation of organizational and industrial psychology research based around organizational socialization. "Organizational socialization is...the process by which an individual acquires the social knowledge and skills necessary to assume an organizational role." [3] This is the basis for the onboarding movement, to find the correlation between acclimating to a new job environment and becoming an effective member of the team and organization. Early theoretical frameworks about "uninspired custodianship, recalcitrance, and even organizational stagnation" [3] have led to the positive correlations of workplace adaptation variables of increasing employee engagement, turnover reduction, and faster time to productivity [4].

Going from informal to formal

Portland State has an issue of size and distribution. An informal system of onboarding is one that does not involve an explicit organizational plan, whereas a formal onboarding program centers around a defined organizational plan. [1] The institution is not large enough that it makes obvious sense to invest in a highly formalized organizational plan for onboarding, but it is large enough that the existing informal methods are lacking. The impetus for the inception of a strategic onboarding committee stemmed from the poor experience of one of the top executives at the University. She had considerable issues coming up to speed and acclimate to the new environment and this showed how obviously something needed to change. The implementation of such a well-devised system is highly recommended and any such system should be evaluated in a holistic sense as part of the overall hiring management process. [4]

A model for onboarding

The beginning of the onboarding process starts with **recruitment** efforts. [5] The perspectives of recruiters and the way in which the interview process is delivered to candidates sets the stage to their initial opinions about and whether or not they want to work for an organization making it an important interaction to introduce the institution's goals, values, and culture. Additionally, recruiting activities "can help newcomers form realistic expectations and prompt anticipatory dealing methods." [6] Some research omits recruiting as an element of onboarding, instead referring to it as "the second of four stages of an employee lifecycle." [7] While this might simplify the evaluation and implementation of an onboarding program, the interplay of culture and perspective on the effective attraction and retention of employees tends to be better aligned with the more common, holistic view of onboarding which realizes that the quality of recruitment practices relates to higher organizational commitment. [8]

Once hired, the new employee will begin interacting with the pseudo-typical HR **orientation** instruments. Some form of new employee orientation is used by 93% of organizations [9] but should not be underestimated. Often this process is condensed into unreasonable amounts of information and expected to be ingested in very little time. [10] A measured approach to deliver the right information at the right time should be conducted to avoid overwhelming new employees with too much information. With proper tracking and mediation in place, all the required orientation materials, forms, and signatures can be completed while giving the employees the time to engage in their work tasks and with coworkers, not just fill out paperwork and sit in orientation and training sessions.

Support tools and clearly defined **processes** is the next key area that a successful onboarding system requires. This can be as simple as a checklist with due dates to as complex as a fully online system for tracking and reporting on new employee progress. [1] These tools need to help avoid "new hires feeling overwhelmed because of the perceived lack of order and cohesion within their new workplace." [11] Organizations with more developed onboarding plans

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also include other support tools such as stakeholders meetings and check-ins at specific intervals to ensure any problems are dealt with in a timely manner. "Meetings at key milestones are critical to let the employee know how he/she is progressing." [5] Whatever the final implementation, a written onboarding plan should be the cornerstone with "the most effective onboarding plans...usually written, communicated to all members of the company, consistently applied and tracked over time." [1]

Coaching and support "can be critical in the success or failure of new employees" [1] and "is one of the most common, and damaging mistakes an organization can make." [10] Having an engaged manager and supportive team can make the difference between a new employee coming up to speed quickly and them feeling like they do not belong or don not know what to do. In many organizations the time available to a manager may be at a premium so another vehicle for ongoing coaching often takes the form of a mentor, sponsor, or buddy program.

Once it is time to get to task, new employees need the appropriate task-based **training** to ensure they complete their duties accurately and satisfactorily. Implementing training programs surrounding core job competencies and tasks is important. Ongoing training to enhance skills and provide opportunities not immediately in-scope of an individual's tasks can create additional efficiencies and give a sense of self-improvement for future growth and commitment to the organization.
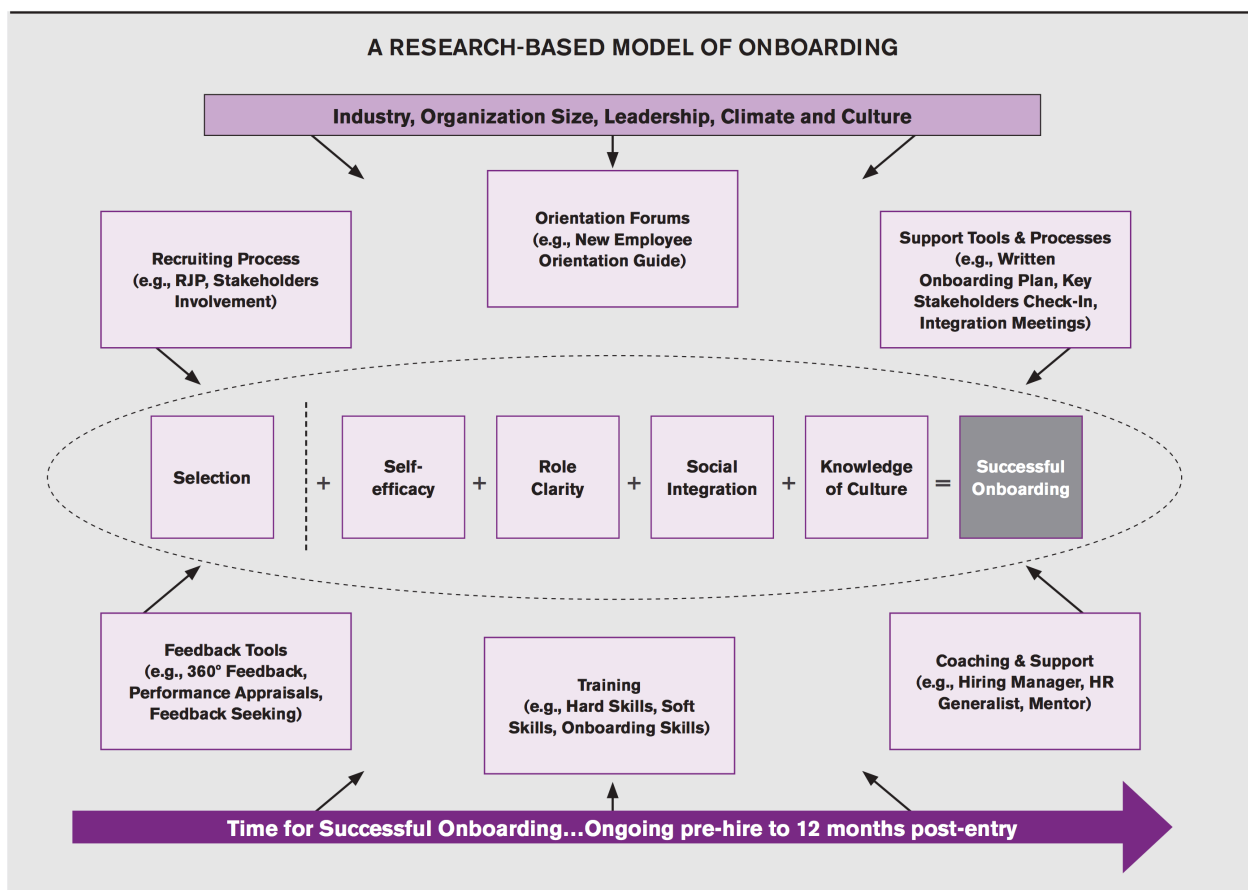
A holistic approach to the onboarding process showing the key onboarding elements of recruitment, orientation, support tools and process, feedback tools, training, and coaching and support. [1]

The final piece of the onboarding pie is **feedback tools**. This can include the aforementioned stakeholder meetings but is more commonly an evaluation process, or less formal check-ins, to see how an employee is adapting and learning in their new environment. Feedback systems can also provide the organization with valuable information on their onboarding processes, such as training, as there's no perspective like a new person's perspective on your organization-specific myopia. Creating a comfortable, communicative environment with bidirectional feedback is important to ensure information flows in this early part of a new employee's relationship. [1]

Through the implementation of a holistic onboarding program, organizations, large or small should be able to achieve significant gains in core areas that "will result in a faster learning curve for new hires, improved communication, and a more productive and engaged workforce." [1]

The "four Cs" of onboarding

Once a candidate is offered a position, the onboarding process can start in ernest. One of the committee's recommendations was to evaluate processes as elements of the "four C's" of onboarding: compliance, clarification, culture, and connection. [1, 2]

These four levels are organized in a hierarchy with **compliance** being the basic requirements of an HR orientation and new hire process: make sure they've signed the proper papers and are aware of the rules and regulations of the organization. The second level, **clarification**, moves into the job and tasks the new employee is going to be performing: do they understand what is required of them and have the proper tools and training to accomplish these tasks? **Culture** is the understanding of an organizations mission, vision, and goals: do they know

- *Compliance is the lowest level and includes teaching employees basic legal and policy-related rules and regulations.*
- *Clarification refers to ensuring that employees understand their new jobs and all related expectations.*
- *Culture is a broad category that includes providing employees with a sense of organizational norms—both formal and informal.*
- *Connection refers to the vital interpersonal relationships and information networks that new employees must establish. [1]*

what the culture is and how they can acclimatize to the new environment. The last level is that of **connections:** the new employee's engagement in the social and information sharing within the organization. [1]

Strategic levels of onboarding

With the "four C's" in mind, Dr. Bauer's research discusses three strategic "levels" to which organizations generally fall into with their onboarding processes: passive onboarding, high potential onboarding, and proactive onboarding. [1] Organizations with simplistic employee orientation programs that focus on compliance with basic manager-maintained clarification tend to fall into the passive classification. They pass the basic requirements but fail to move into an active system

Onboarding Strategy Level	Compliance	Clarification	Culture	Connection
1 Passive	YES	SOME	LITTLE/ NONE	LITTLE/ NONE
2 High Potential	YES	YES	SOME	SOME
3 Proactive	YES	YES	YES	YES

Passive, high potential, and proactive strategic onboarding tiers and their general adoption of the "four Cs". [1]

of engagement and cultural adoption. High potential organizations move past the basics and are capable of some cultural onboarding elements with some limited connection facilities in place. The highest level organizations are proactive and strive to cover all "Cs" with care and diligence. Only roughly 20% of all organizations are best-in-class performers when it comes to a comprehensive, "four Cs" implementation of strategic onboarding. [12]

Correlating Goals to Research

Analyzing deliverables as "four Cs"

The initial committee progress report described the findings of the committee and the principles of the "four Cs" as a framework for an onboarding program, but failed to relate the deliverables to these categories. In Table 2 below is an interpretation of these deliverables shown with the attributable "Cs" and which element of an effective onboarding program this falls within.

Table 2: Deliverables with associated "C" and onboarding program element.

DELIVERABLE	C ASSOCIATED	ONBOARDING ELEMENT
Reformat HR website	Compliance	Recruitment, orientation, support tools/processes
Update New Employee website	Compliance	Orientation, support tools/processes
Welcome Letter with Letter of Offer	Compliance, Culture	Orientation
Manager & Employee checklists	Compliance, Clarification	Support tools/processes, Coaching
Departmental Welcome Packet	Compliance, Culture	Orientation, support tools/processes
President's Welcome Letter	Culture	Orientation
Automated onboarding emails	Compliance, Culture	Orientation, support tools/processes
History of PSU video	Culture	Orientation
Automate IT system access	Compliance	Orientation
Revamp New Employee Briefing	Compliance	Orientation
Create New Employee Handbook	Compliance	Orientation
"Quick accept" process	Compliance	Support tools/processes
Electronic *Letter of Offer*	Compliance	Support tools/processes
Online benefits signup	Compliance	Support tools/processes
Communications plan	Compliance	Support tools/processes

"Cs" and onboarding elements covered

The majority of the elements covered by the onboarding committee's recommendations fall under the compliance arena. This is obvious as the majority of existing material and processes were centered around the existing employee orientation program already in place within the organization. Additionally the committee's charge stated to a goal to "balance compliance with compassion while recognizing the diversity of employee types." [2] Initial discovery teams revealed several lacking elements in the orientation material and specifically recommended improvements to the formatting and delivery of much of what human resources had available with the idea of making it easier to access

and use by new employees and managers. There is also a strong showing of cultural elements as the committee wanted to emphasize the history and community being a contributing member of Portland State embodies.

As for the elements covered, a lot of focus was placed on support tools/processes and orientation features. This ties directly into the compliance level and reinforces the fact that Portland State had been operating at a passive strategic level in their onboarding practices. The Manager's checklist does incorporate clarification and connection elements like check-ins, assigning a peer, providing a campus tour, and others. With the implementation as it stands, there is a clear movement towards a high potential strategic onboarding organization. Lastly, feedback tools are touched on in the Manager's Checklist and this provides a good framework and reminder system for managers to use to ensure they are touching base with new employees frequently. [14]

Missing "Cs" and onboarding elements

The top three layers of the "four Cs" are lightly touched upon by the deliverables of the committee as there is a long distance to travel from being a passive onboarding organization to effectively move into the high potential strategic tier and ultimately attain the proactive potential. Clarification is distributed with the immediate supervisors and unit managers and they are provided a Manager's Checklist and a presentation discussing onboarding and the vision behind it. However, there appears to be a disconnect between this information and a formalized plan one can refer to properly convey this need to the numerous unit managers across campus. The committee has put together brown bag seminars on the benefits of an effective onboarding process and invited office managers and hiring managers to attend. This outreach gathered reasonable attendance but should be continued in a systematic and repeatable fashion as time goes on.

Connection is touched on a little in the Manager's Checklist and a buddy or mentor program has being discussed but has yet to be implemented. Having a "comprehensive sponsor or buddy program" is a great way to "ensure cultural integration of new employees " and should be implemented and supported as part of the formal onboarding plan. [7]

Recruitment has not been incorporated into the onboarding process as the focus was initially placed on the existing systems and processes. Future evaluations and phases should examine the role that recruitment plays in the onboarding process and make suggestions to enhance this early touchpoint in the process of bringing new employees to Portland State.

Given that Portland State grew in enrollment over 50% in the past decade, it is no wonder there have been growing pains. [16] The overall goals of the strategic onboarding committees deliverables should move the organization firmly into the high potential onboarding tier and with a little time and more effort, the lauded proactive tier may be within reach.

Measured progress

It is important to measure success when implementing and evaluating the effectiveness of a strategic onboarding program and this requires the establishment of metrics to gauge the effectiveness of the onboarding program against its goals. [7] The two primary methods of tracking are operational or strategic. Though not specifically stipulated in the initial deliverables, one studious member of the onboarding committee took the time to create a survey to send to newly hiring Portland State employees. The survey is highly correlated to the goals and deliverables of the strategic onboarding committee and as such are centered around compliance, though questions about new employees attitudes, culture, and connections are included as well. With entirely self-reporting data of active employees, there is little strategic analysis that can be gleaned from this data but it is an excellent starting point to discover operational

baselines, attitudes to the hiring process, onboarding task efficacy, and the overall first 6-month experience for those new to the university.

Methodologies

Survey says:

The survey asked 91 total question, with most being categorical sets of scalar responses of Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree, which results in 38 independent questions or question sets. A handful of questions are topical or binary indicators of completion of a specific onboarding task and a few are followups to questions such as "on your first day of employment at PSU" was your "desk was ready for use." This is followed with "when was your desk ready." [17] And yes, one person responded that their office was still not setup. The pool of respondents was drawn by exporting institutional data from the central enterprise resource planning system into a candidate pool with hire dates of July 1, 2012 through June 30th, 2013. Additional information was appended, such as major organizational unit and bargaining unit to investigate potential variances between operational units or contractual divisions. The sample set included 268 individuals, 156 of which started after January 1st, 2012. The survey recorded 155 responses over a period of approximately three weeks and included sending several reminder emails.

The strategic onboarding committee made its initial recommendations and plan in August of 2012 and completed the majority of the first phase items by December of 2012. This is also when outreach of the new tools and vision were initiated to hiring managers and is a good inflection point to test my null hypothesis: there will be no change in onboarding-related activities, opinions, or efficacy between the time previous to the formalization and distribution of materials then the time prior to them existing (i.e. before January 1st, 2013). In this evaluation, I focus on a simple t-test of the gathered quantitative data and whether or not there is a statistically significant shift post-onboarding implementation. Given that our sample size was relatively small, only a few of the questions proved to be significantly significant between the target populations, but there is a lot of data that is useful for baseline analysis of current operations.

Reasonably high ratings across the board

Overall scalar responses were fairly positive with average values in the high 3s to low 4s. This can be interpreted that most applicants were pleased with their onboarding to Portland State for questions such as "how was Portland State's hiring process compared to other jobs you've had," which resulting in nearly 36% of respondents reporting that PSU's process was better, 66% reporting that is was about the same, and only 8% responding that is was worse. Equally impressive was responses to "I feel a sense of community at Portland State" with responses for "Agree" a strong 49% and "Strongly Agree" holding an additional 22%. Just under 12% disagreed or strongly disagreed with this statement.

Several questions explored the idea of frequent check-ins and engagement with inquires like "did your department check in with you early and often during the beginning of your employment" gaining over 75% agreeable responses and just over 9% disagreeing. This was also one of the few questions that showed a statistically significant improvement between the pre-onboarding period and the post-onboarding cutoff of January 1st moving from an average response of 3.41 to 3.52 ($p=0.05$). Another statistically significant value was a supervisors facilitating workplace integration which, on a scale of 1-3 scored 2.17 prior to the onboarding program and 2.36 after ($p=0.02$).

Other questions attempted to deal with levels of clarification in job duties and task assignment, and contrary to common water-cooler talk the author is privy to, 88% of respondents agreed that their "tasks/duties...are consistent

with…job expectations." Only 5% disagreed with this proposition. Similarly, understanding of individual's works schedules scored almost 96% as agreed. Maybe it's just that teachers don't have fixed schedules!

Compliance is a big part of the onboarding process and often times a hurdle to overcome with new employees. There can be mountains of paperwork and policies to review and the questionnaire surveyed new employees on their understanding of several core policies at Portland State including: the discrimination policy, the acceptable computer and network use policy, and mandatory child abuse reporting. These questions were rated on a scale of: do not understand at all, understand a little, understand somewhat, and completely understand. For almost all the policies surveyed, the responses came in with 85% or more of respondents reporting they somewhat understand, or completely understand the policies. Interestingly, policies that have formalized online training–the Prohibited Discrimination and Harassment Policy, and the Confidentiality of Student Information (FERPA) policy–had the very high returns with 72% and 68% of respondents completely understanding the principles. To get an idea on the efficacy of the only mandatory online training, the discrimination policy was referred to twice; once on whether or not they had completed the online training and then again on their comprehension of the policy. Both questions resulted in statistically significant differences across the time boundary and both questions regressed. Fewer people completed the training, and comprehension went down. As the only mandatory online training for all employees, IT systems have not yet caught up to automating the feedback loop on whether or not new employees have completed this course. It it likely that the manual generation of the completion rate was not run and the training reinforcement was not sent out for the newer generation of workers. This does hint at a potential correlation between the efficacy of the training directly affecting the comprehension of the policy but more investigation will be required to corroborate this postulation.

The only other two policies with high levels of comprehension were Mandatory Child Abuse Reporting and the Drug Free Workplace Policy with 71% reporting complete understanding for each. The first is likely correlated to brown bag seminars that HR has been conducting throughout the year to reinforce changes to the Federal law just this year: all Federal employees, educators and staff, are now mandatory reporters (as opposed to just educators previously). With this change there was significant outreach across campus, local news coverage, and discussion in work groups. As for the drug abuse policy, it seems bad form to say you don't understand that you are not allowed to do drugs at work. The five remaining policies covered had complete comprehension returns in the 43-58% range. This might be an area where some additional training or guidance would be of assistance to employees.

Might need some work

One functional area that appears like it could use more effort is in first day office preparations with 23% of respondents reporting their office was not setup on their first day of employment, 25% of phones were not ready, 18% of desks not prepared, and 25% of computers were not available for use. This is an area that Portland State could easily focus on and expect to make big gains as "first impressions can and will taint…future perspectives on the employer." [10] The final question that pops out and was a subcomponent of one of the deliverables, an acronym list marketed as the PSU Alphabet Soup. The responses showed middling returns from individuals with 30% saying they do not know where to find help with institutional acronyms, 27% choosing the neutral option, and 29% agreeing. Only 8% stated they strongly agreed they knew where to find this information justifying more outreach in this area.

Analysis summary

Overall the data does not portray a clear and systematic progression from pre-onboarding operations to post-onboarding operations. This could be a lack of enough respondents, or because the amount of change is minimal between the point of inflection. With these results it becomes impossible to broadly assess the gains of the onboarding

initiative but it does provide excellent baseline data about employee perspectives to the hiring process and onboarding fundamentals. It is a great start towards understanding the impression the organization has on employees in their first 6 to 12 months on the job and can be leveraged in future analysis to see if additional trending information can be gleaned.

Discussion

Making headway

Portland State started with new employee orientation, information on confusing websites, and no tools for managers and new employees to calibrate themselves to the potentials of an effective onboarding process. With the strategic onboarding initiative, significant strides have been made towards this goal, providing effective, professional new employee and manager checklists, centralized documentation delivered in a "when it's needed" format, and a friendly welcome letter from the President of the university as the first email they get in their PSU inbox. Outreach has been conducted to inform the largest hiring units across campus of the initiative in an attempt to indoctrinate the vision of a comprehensive onboarding program. It is clear there is a movement to instill the importance of each new employee's first 6 months on the job as special, to make them feel comfortable, and to assist with this adjustment period as much as possible.

In the next phase, more cultural and connection oriented materials will be provided through departmental welcome packets, a History of PSU video, and more automated emails with useful information for employees delivered at appropriate intervals in their employment ramp-up. The last few deliverables should enhance elements of clarification by providing employees the access they need, when they need them, in an automated fashion. The recruitment-to-hiring handoff process will be investigated to improve and automate the delivery of Letters of Offer with accompanying electronic acceptance, a feature that will enhance the hiring experience, particularly for those relocating to Portland who presently have to wait for national or international post to deliver and return offers prior to official contractual engagement with the university. Finally, a comprehensive revision of the new employee briefing will attempt to streamline the informational session and deliver a more targeted experience to new employees that does not overburden them with too much information, or provide them information not targeted to their bargaining unit or needs. [10]

Show me a plan

What is missing from this onboarding agenda is a formalized onboarding plan. The committee meets and works towards deliverables but there is nothing formal that we can point to as the central, guiding, organizationally-approved plan. This does not need to be complicated and can simply explain the reasoning, goals, and tools available. Providing this focal point will enhance the project long term as it will be the guidepost to which future evaluations and deliverables can be evaluated and controlled. The plan needs to clearly stipulate the goals of the strategic onboarding initiative past its inception phase. The existing objectives make for a good starting point.

1. Facilitate a new employee's ability to contribute to the University as quickly as possible by providing them with the logistical support they need to be productive from day one.
2. Provide new employees with a comprehensive understanding of the University's organization, history, terminology, and norms.
3. Welcome new employees into the PSU culture, encouraging engagement with, and commitment to, the University.
4. Help increase new employee retention rates.

Some reworking of these goals might be warranted as they need to be measurable over time. The first objective stipulates that new employee's are productive from day one, an unlikely and unrealistic expectation. The second goal is inclusive of some cultural elements and potentially some compliance elements but is not specific to any of the six elements as described by Dr. Bauer. The third objective demonstrates cultural and connection ideals and can be left vague but further definition should be provided in a comprehensive plan to guide the methods by which cultural adoption might occur. The final objective is the most objective, and the only strategic goal of the bunch but as stated is nothing more than a Hail Mary as we have no method of validating its efficacy long term. Some method of reporting and correlation will be required if we are to leave this as a goal; simply stating employee retention will go up does not make it so.

With so much of the research and work underway, a reformulation of the existing materials could be engaged to provide a plan that outlines the strategic onboarding requirements for Portland State. A quick outline might be as follows:

Reasoning - the formal reasoning and research references for implementing a strategic onboarding plan at Portland State.

Objectives - clearly stated but abstract objectives that can be tied to attainable metrics.

Analysis - evaluation of key constructs and how they enhance the primary objectives.

Tools - specific tools and where to locate them.

Reporting - the methodology for ongoing reporting and measurement of the plan's effectiveness.

Stewardship - define the stakeholders and owners of the processes and reporting elements of the plan.

Enhancements - the current set of deliverables and associated implementation timelines.

By leveraging the existing body of research and pinning the role of the onboarding committee's charge to a long term plan that incorporates recruitment, orientation, support tools and process, coaching and support, training, and feedback tools the organization will have a framework to continue these good works and deliver on the gains that a truly proactive onboarding organization can achieve.

Effectiveness through monitoring

Late in the game, a single player in the onboarding committee designed and presented a robust survey for new employee feedback. It was reviewed by the committee and sent out to all new hires covering a year period starting and ending on the University's fiscal year boundary. This provided a unique snapshot into the attitudes and efficacy of the current and enhanced practices on campus and is a great starting point for followup comparative analysis. There are several ways that this data might be better leveraged in the future: 1) enhance questionnaire to include all elements of the strategic onboarding plan; 2) correlate specific questions to the well-defined objectives; 3) key metrics to the "four Cs" and six onboarding elements; and 4) repeat the survey on a consistent basis and do inter-year comparisons to locate trending data and provide a feedback loop to determine deficiencies and future enhancements.

With a master plan in hand, evaluation and modification of the survey to include questions that specifically address defined objectives and the findings of the analysis will be important for determining long-term efficacy of the program. A good example of this is in how productive employees feel they are, as well as their managers. Adding a survey for managers about their employees would also create a wealth of information but would add significant com-

plexity to the survey process and data analysis on a recurring basis. Objectives that fall under the strategic category will require some form of institutional commitment outside of employee surveys, such as the aforementioned impact on retention rates. If the final strategic onboarding plan stipulates an objective, it is imperative that we "ensure that the program is monitored over time." [1]

Once the questionnaire is compiled with sufficient coverage of all objectives and elements detailed in the strategic onboarding plan, each question should be correlated to these objectives to provide a measure of the goals effectiveness as each survey point and for comparison over time. This will provide the organization a view into how its onboarding practices are working and should quickly show deficiencies on specific topics.

For a richer understanding of the objectives and elements like training and coaching, an analysis of questions in aggregate could be performed to give a clue to the overall effectiveness in each topical area. Providing two layers of this analysis will provide an effective summary of the overarching objectives and whether or not they are improving or regressing over time. Two layers of analysis, taken directly from Dr. Bauer's research would be fitting: correlating each question to the "four Cs" and the six onboarding elements of compliance, clarification, cultural, connection, recruitment, orientation, support tools and process, coaching and support, training, and feedback tools. With the questionnaire correlated to these constructs a statistical technique–such as a multivariate analysis of variance (MANOVA)–can be leveraged to investigate the efficacy and change in tiered, topical analysis. This will be helpful for investigating overall effectiveness in a concise way that would be useful for executive and public summaries.

Finally, repeating the data collection in a consistent and repeatable manner on an annual basis in a timely fashion will allow the discovery of long-term trending information. The present survey tool is well designed and with minor modifications and additions can be leveraged as a long term tool for supporting ongoing onboarding reporting. If additional categorical metrics are designed, this longitudinal approach should provide a vast wealth of information that can be utilized for analysis of everything from specific tasks involved in the onboarding process up to an abstract analysis of the progress over time. As shown with several measures in the first run of the survey, some elements might even regress slightly in their efficacy and it will be imperative to understand and adjust to these meters over time to ensure continual process improvement surrounding the strategic onboarding initiative.

Inevitable change

Any long term plan requires feedback loops to deal with change. As the program increases in effectiveness, a plateauing effect will be reached and a system for assessing ongoing implementation deliverables should be designed to ensure only the highest-value items be engaged in with Portland State's limited implementation resources. At some point this equilibrium point will be reached and the plan should also discuss the change of doing nothing. Finally, when business environments shift, requirements change, population and hiring practices mature, the program stewards will need to be called into action and adjust. This may result in small or large reformations of elements of the plan and processes, but flexibility should be taken into account and responsibility defined for dealing with these ongoing needs must be stipulated in advance. This will ease any reactionary changes and provide a clear path forward.

Conclusion

With expert advice from from Dr. Talya Bauer, Portland State University's Strategic Onboarding Committee championed a noble goal: to better align Portland State's processes and practices to the needs of new employee with the hopeful results of increasing job performance, retention, and morale. The progress made at the time of this writing is substantial but the results are inconclusive on the overall effectiveness across the time period evaluated. What is known is that Portland State is doing a good job with the hiring processes but there remains plenty of room for improvement. Moving from a passive onboarding organization to a high potential operation has taken the focused effort of dozens of individuals across a myriad of departments and the returns of this work will take time to truly ascertain. A significant amount of deliverables remain and it will be important to maintain the same focus in completing the remaining scope of work.

Going forward, keeping an mindful eye on the research in the field of strategic onboarding, organizational socialization, and statistical analysis needs to be maintained beyond the program's inception. Reinforcing the connections between the "four Cs" and six elements of onboarding to the objectives and deliverables will allow enhanced understanding of the overall affect of the program across time. Future exploration of missing elements, and ongoing reporting of the program is needed to align long term goals with deliverables. Implementing changes and improvements is resource intensive and only by continual analysis can the return on these investments be tracked and managed.

Having a full plate of tasks means that adding many of these elements will not likely come anytime soon. The committee is several months behind delivery of the phase two goals with phase 3 being even more complicated with IT automation and a complete reworking of the new employee orientation as major deliverables. If anything should be done at this point, midstream in the process, a fleshed out strategic onboarding plan should be compiled. Without a central pillar to compare actions and outcomes against, it may end up costing more time and effort in the long run to recalibrate if this initiative were to get off track. Development this plan is half complete. An assessment of the core principles and research in the field was conducted initially, this paper details additional core principles, and makes recommendations on format, deliver, and stewardship of such a master plan.

With a plan, a method of measure, and the existing wealth of compassion and engagement of the Portland State community behind it, the long term success of the strategic onboarding program should be able to steadily work its way towards become one of the lauded 20% of companies capable of calling themselves a proactive onboarding organization.

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