

Reprinted from: Onboarding 2.0: Methods of Designing and Deploying Effective Onboarding Training for Academic Libraries, *Principles for Designing Active and Adaptable Onboarding Experiences for Library Employees*, 37-61, 2019, Dani Wellemeyer and Jess Williams.

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*Chapter 3*

**PRINCIPLES FOR DESIGNING ACTIVE  
AND ADAPTABLE ONBOARDING  
EXPERIENCES FOR LIBRARY EMPLOYEES**

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**ABSTRACT**

The development of an active, adaptable, culture-centric experience for new library employees is a crucial first step in building effective teams. Establishing a culture of teamwork has long-lasting benefits and can be accomplished by thoughtfully scheduling the onboarding experience and considering ways to show trust in new employees. Using your organization's designated technologies to guide employees through their onboarding serves to efficiently train the employee and concurrently establish a template for future iterations. Creating an active process optimizes the onboarding experience by employing such techniques as competency-based training, flexible content delivery for various learning styles, and conversational evaluation. Academic libraries encompass

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substantial variation among types of work, types of staff members, and rates of evolution in the associated fields of practice. A library that has developed adaptable onboarding materials that prioritize early integration of new employees into the team and that incorporate the principles of training design in this chapter can then update or improve its training as quickly as the field of librarianship changes.

**Keywords:** employee orientation and development, Competency-based training, Human resources management, Hybrid/Online Onboarding Team-building

## INTRODUCTION

Designing a thoughtful and efficient onboarding experience for new employees is an opportunity for supervisors to lead by example from the outset. Onboarding librarians, paraprofessionals, or student workers by promoting a culture of teamwork, modeling expected behaviors, iteratively creating training materials that are valuable to the entire team, and leveraging instructional design principles makes the best use of new employees' introductory days by ensuring that they learn by doing. Onboarding introduces individuals to your organization's culture, helps them to find their place amongst their colleagues and develop their identity as a part of the team, supports them in making friends (if they want to!), and ultimately provides the tools and information they will need to be successful and the opportunity to become self-sufficient.

## LITERATURE REVIEW

Provision of an adequate, inclusionary onboarding experience that makes individuals feel well-prepared and supported in their work is a matter of equity in the library workplace. In the same way that siloization and information gatekeeping result in a fractured organization, inefficient teams, ineffective processes, and degraded morale (Evans, Hendron, & Oldroyd,

2014), inequitable onboarding across an organization contributes to the formation of groups of individuals with fewer opportunities for success and advancement. Employees in a department with robust training and development are at an advantage over those without; all of a library's employees deserve the even footing provided by a common baseline in their onboarding experiences. This is a disparity easily remedied by cross-department cooperation and administrative support. Thorough onboarding is a long-term investment in the individual, a direct indicator of their future success (Hall-Ellis, 2014), and a smart practice for a library administrator looking at long-range operational planning.

Onboarding is an expression of an organization's dedication to its mission and to ensuring that all employees are able to contribute to that mission. Brown & Yoshioka (2003) have demonstrated that an employee's connection to the organization's mission—the degree to which they believe in it and work for it—is directly correlated with their level of satisfaction and likelihood of remaining at the organization. In this way, implementing an invigorating onboarding experience that connects individuals to the intrinsic motivation of helping the organization to be successful is not only an investment in employees, but also in the library and its mission and strategic goals.

The fundamental onboarding principles of promoting a culture of teamwork, modeling, iterating, and adhering to instructional design best practices are scalable, transferable, and apply to libraries of all kinds, staff members of all classifications, and budgets of all sizes. In the same way that library and information professionals look to the literature in our field for tested theories of information organization, user behavior, and management to guide decision making, and then apply those theories to their particular real-world contexts, the principles presented here are intended to lay groundwork, spark inspiration, and provide flexible guidance for practitioners.

## **METHODOLOGY**

### **User Groups**

The principles of training design described in this chapter provide managers, supervisors, and library human resources staff with opportunities to customize templated onboarding experiences for different classifications of library workers, employees in different departments, and even the individual newly filling a position. Some of the customization will be implemented by the manager setting up the onboarding and assigning the training tasks; some of it is up to the trainee as they self-evaluate their skill level and make learning choices allowed by the design of the training plan. The fundamentals presented in this chapter apply to all library employees, but some have special relevance to three major groups: librarians, staff, and student workers.

### **Librarians**

Librarians generally experience a degree of autonomy in their jobs, and to some extent are expected to self-teach necessary new skills and seek professional development opportunities. This expectation that professionals will continue to educate themselves does not eliminate the need for onboarding in a new organization and training in a new role. In order to strike a productive balance between meticulous training requirements and total reliance on employees to train themselves unguided, use modeling and instructional design to create a process that empowers the trainee to assess their needs, exhibit their competence in a skill area, and make appropriate choices to proceed through their training journey.

## **Paraprofessionals or Staff**

Two components of adaptable and active onboarding design specifically address the need for flexibility in training expectations for variously classified library workers with diverse job duties. Designing a flexible learning experience—in which an individual can work at their own pace, make decisions about how much time to spend with a topic, and perhaps even choose between types of training (video, text, self-teaching, or on-the-job training)—provides staff the option to stick to a predefined learning path or to make choices that are particular to their learning style or their job. Competency-based training allows individuals to self-identify their skill or knowledge level and be trained accordingly, eliminating redundant or pedantic training for some, and offering detailed or remedial training for others.

## **Student Workers, Clerks, or Pages**

Student workers present the biggest challenge to library managers seeking to engage employees with their work. Clerks, pages, student workers, interns, or other entry-level library staff require a clear path for training with defined objectives and specific tasks. Onboarding for this group is strengthened by application of instructional design principles to enhance engagement with learning, clearly demonstrate meaning and value, and maintain efficiency by communicating objectives. Showing student workers or volunteers the value and transferability of the skills they will acquire working in the library increases the likelihood that they will be dedicated to their jobs and perform tasks in a way that meets expectations.

All types of library employees—from the new department head with 20 years in the field to the student beginning their first job as a freshman—will benefit from an onboarding practice that introduces them to their new team with enthusiasm, models expected values and behaviors, iterates onboarding materials, and makes the entire practice active and meaningful.

## **INSTITUTIONAL REVIEW BOARD STATEMENT**

Institutional review board approval was not required for this chapter, as it is a description of practices in academic libraries and involved no work with human subjects.

## **DISCUSSION**

### **A Culture of Teamwork**

Teamwork is essential to every organization, even in libraries where employees spend significant time working independently. Onboarding new employees into a culture of teamwork has the added benefit of strengthening the workplace experience for all employees.

Here are seven strategies. Choose the ones that make sense for the personality of your existing team. Perhaps your team is comprised of kind but serious people; you do not have to try to make everyone into the silly crew. Make decisions for onboarding design that have your whole team in mind. Take a moment to think about how you would describe your organization or team culture; this is an exercise that few of us undertake until prompted. What aspects are important for new additions to understand? What makes your library special, or makes your team unique in your library? You don't need to provide a bulleted list of your team's defining characteristics in the onboarding reading materials as long as you are planning to show them to your new team member using some of the following strategies.

### **Authentic Sharing**

Authentic sharing means creating opportunities for your new team member to get to know their new place of work and the people in it through the stories that everyone is comfortable telling. Individuals can share about

themselves, their interests, and their families, or they can share things that are more focused on work. Ask your team to tell their new colleague stories about the library you work in, their time in different departments there, and the neighborhood surrounding your library. Each person can be true to themselves by deciding how much of their personality to share (or not) and how soon, and the new addition to the team will have the opportunity to make friends (if they want to). Your new employee might be a fresh transplant to your city, so developing a sense of belonging and feeling like part of a team could be even more important to them than you realize.

### **First Impressions**

Create an onboarding calendar that considers how the new team member's first day of work will make them feel, and what their impression of their first week and month will be. For example, college students expect their first day of class each semester to be a "syllabus day," during which they will attend class at its designated time and place, receive a copy of their syllabus, be introduced to the professor and their classmates, and maybe do an icebreaker activity or one that overviews the course topic. This day is easy and allows students to absorb their new surroundings, meet new people, and get acclimated to a new schedule and a new set of courses. Regardless of your position on whether or not the "syllabus day" is a waste of time in a college context, the model is a useful one when planning your new employee's first day. Plan to introduce the new recruit to their environment, to their new co-workers and colleagues, and to a survey-level look at their new job. Include a lunch meeting or outing, if possible, or make the work day a short one. Give them time alone, if that will be a regular part of their daily routine, or with their new team, if they will spend a lot of time together. And, plan to spend time with them yourself as their supervisor or manager. Nobody wants to feel on their first day like their boss does not have time for them.



## **Schedule Variety**

When you create an onboarding schedule, find ways to include interesting, active, or fun elements. Leave chunks of time available for the new employee to schedule themselves, but be sure to give guidance on the types of appointments to make. Blocking out time for both independent and conversational reflection creates opportunities for questions to be asked and answered (more in section 5.4.3.). Schedule field trips; these could be to other areas of your library, organization, or campus, or to other libraries, museums, or archives in your geographic area that are important partners in your work. Are there colleagues that your new employee will benefit from meeting? Mentorships that you could encourage to form? Directing the new employee to set up introductory meetings ensures that they will be acquiring knowledge from more rather than fewer expert sources, and supplements the information you will be downloading to them.

## **Friendly Onboarding**

Introduce a sense of levity into onboarding materials and planning wherever you can:

- When you have new employees provide information (cell phone number for the emergency phone tree, birthday for the library calendar), also ask for other important things, like: favorite snack, early bird or night owl, favorite non-traditional holiday (Rex Manning Day, anyone?), or caffeine-delivery system of choice.
- As you plan for active learning (see section 5.4.), pay attention to how interested you are in the activities you are planning, the training plan you're writing, or the instructional videos you're choosing. If you fell asleep screening a video to teach your team members about fair use and copyright, they are going to be bored out of their skulls as well. Pick a different video!

- Libraries are not boring places to work. We expend time, energy, and money on making our public spaces pleasant and enjoyable for our users, and portraying the personalities of our libraries to them through space design, displays, and social media. Nobody is telling us to make our onboarding experiences serious and boring for our employees; we're making that choice ourselves. So make a different choice. As long as you're not writing policy, use informal language, include GIFs, or start a library-wide inside joke.

### **Instant Welcome**

Create an instantly welcoming atmosphere. Give your new hire the benefit of the doubt, include them in the discussion and decision-making processes right away, and make positive assumptions about their knowledge and credibility as a contributor. You hired this person, so you can be confident in expecting them to start adding value to your team right away. Invite the new employee to attend all relevant team meetings from day one, and explicitly express the expectation that they should participate as they feel ready. The team's goal is to welcome the new hire in such a way that exudes, "You are one of us. We value you and what you have to contribute!" Any attitude that communicates the need for the new employee to pay their dues or bide their time before contributing should be promptly squashed.

### **Startup Stereotypes**

Borrow ideas from startup culture. Maybe your library director is not going to fund a ping pong table for the staff room, but there are other ways to think like a startup. Many of the perks offered by new, small companies catering to younger recruits are amenities—catered lunches, company outings, recreation—but others are inclusive policies. Well-designed, thoughtful onboarding in itself is one way that startups incentivize new employees. Writing flexible work arrangement policies, formalizing remote-

first team practices (Ryder & Moon, 2017), rewarding employees with recognition, helping individuals take advantage of your organization's benefits that support work-life balance, and ensuring that team members are connected to the mission of their work are strategies that do not cost your library anything monetarily.

### **Motivational Onboarding**

Introducing new team members to the values and mission of your organization is widely assumed to be part of onboarding processes, but in reality, it is often overlooked in the rush to get to the important details of daily work. Individuals need to know what their library, and more specifically their team, is working toward. Talk about how your team's work contributes to the library's mission, and have your existing team members share stories about how they have helped patrons in small and large ways. Libraries change lives, helping students who would not otherwise be successful in their educational experience, supporting important research, and assisting community members with finding critical information for job searches and health care decisions. These stories are motivational to those who work in libraries, and opportunities to make a difference are often why your new team member applied for their job.

Building in opportunities for small wins throughout the onboarding process is motivational. Break training up into units, create checklists that are satisfying to mark off, and don't forget the small congratulations as first days, weeks, and months are completed. Creating a culture of wins early in your employees' tenure can help your entire team to focus on the positive even when they've been around a while. Finally, skip meaningless tasks or training topics. The instructional design principle of writing learning outcomes (section 5.4.1.) allows you to identify the reason a trainee should complete a task and provides a concrete way to communicate that reason. Establishing meaning by making these connections provides intrinsic motivation, so you don't have to depend on the extrinsic motivation of that fat library paycheck to incentive your new team member.

These strategies to encourage new employees to have a positive experience in their first days may seem like a waste of time. If nobody ensured that you had fun when you started your new job, what obligation do you have to your new hires to create a positive atmosphere around their onboarding? Well, what kind of performance do you hope to elicit from your team members? We're all aware of the lasting importance of first impressions. Employees who experience job satisfaction—which is arguably heavily influenced by the environment in which they work—perform better at work (Alessandri, Borgogni, & Latham, 2016).

## **Modeling**

When a new employee begins their job, modeling happens organically. Immersed in a new and unfamiliar environment, the employee looks to those around them to provide cues for behavior, cultural expectations, and communication. Intentionally expanding the modeling principle accelerates the new employee's sense of belonging and competency; it lends formality to the modeling happening naturally and in so doing yields clearer expectations. The most effective modeling during the onboarding process utilizes technology, exemplifies expected behaviors, and demonstrates specific skills and processes for the job.

## **Use the Tool to Teach the Tool**

Every library has chosen technologies, tools, and systems to organize their information and to manage their work. Your systems might be technologically intensive and cutting edge, with each employee checking in with multiple synced platforms daily for different types of tasks or projects, or they might be basic but well-suited to your organization and personnel, with clipboards and checklists to keep things running smoothly. No matter what your library has chosen, you should be onboarding new team members within the tools they will be expected to interact with in their daily work.

What does your library use? A project management tool, a ticketing system, an intranet, a wiki, a shared network drive, a communication platform, a series of checklists? Think about the technologies your new employees will need to learn to use, and how you can design an onboarding experience that teaches them the ins and outs of those tools by practicing using them. The following example illustrates what can be gained by introducing trainees to important technologies immediately when they start, and the accountability boost for your team that can occur as a side benefit.

*Example: Modeling a Project Management Tool  
with Native Onboarding*

An academic library with a robust information literacy program integrated into general education classes regularly employs library science graduate students to help staff the teaching department. New graduate hires are introduced to the teaching team's project management tool of choice—Trello—on their first day of work.

Each new hire is given all of the materials, checklists, and instructions they will need for their entire onboarding experience in the form of a Trello board copied from a master version. (In Trello, a kanban-inspired tool, a board represents a virtual bulletin board, with cards for tasks or items.) The first Trello card the new hire should read is marked *Read Me First!* and it contains their introductory materials to learn about Trello, which they will use every single day on the job to manage their tasks, larger projects, and classes they will teach, and to communicate with their teammates and their manager. They watch short videos developed by the product team to get a tour of the tool and learn its key functions. They follow instructions on subsequent cards on their Onboarding board to explore Trello more in-depth, learning by doing each action they are introduced to.

The Onboarding board belongs to the new hire and they can arrange it or work with it however they like. The manager has access as well, and can answer questions asked in the platform, add new cards with additional information, or assign new tasks. New graduate students on this library team quickly become proficient Trello users since they use it from the moment they start work. In fact, they keep the rest of the team—who might find

themselves drifting away from the platform as they work more with other tools, or in email—accountable to the project management tool.

## **Model Expected Behaviors**

There is no better time to set the tone for workplace behavior expectations than when your new employee begins the onboarding process. This tone is transmitted through both the onboarding materials you create and the speech and body language that you use. While some expected behaviors will be a result of the library's culture or policies, this short list covers the essentials:

- *Communication.* Welcome your new employee with hospitality by communicating the way that you want to be communicated with, in written and verbal communications!
- *Collegiality.* Provide opportunities for the new employee to socialize and collaborate with colleagues, to observe how coworkers treat one another and to begin to form relationships.
- *Authenticity.* Don't just talk about teamwork—work with your team and bring your new hire alongside you. Modeling authenticity will build trust; answer questions honestly and openly, and resist the temptation to sugarcoat any challenges about the organization's culture or operations.
- *Active listening.* Guiding someone through the onboarding process can feel like you are responsible for transmitting all the information. Model active listening when spending time with your new employee by affirming their reflections and asking follow up questions.
- *Curiosity and continuous learning.* This behavior comes naturally to many individuals who have chosen to work in librarianship. Show your new employee that their new workplace is safe for asking questions and exploring new opportunities. One simple way to show this occurs when introducing the new employee to staff members, especially in other departments. Make the introduction with names

only, then ask the staff member questions, allowing them to share about their role in their own words, instead of communicating on their behalf.

## **Demonstrate Skills and Processes**

When it comes to training, many libraries use the classic shadowing method: a new employee shadows a veteran on the job and asks questions. Then, the veteran employee will shadow the new one and offer feedback. This technique is a great example of a quality that your onboarding process should integrate in as many ways as possible—show, don't tell.

Demonstrating skills and processes builds on the foundation laid by the previous modeling principles. Teaching new hires small skills that will translate to larger processes they will need to do builds confidence and maintains motivation.

### *Example: Teach Teachers to Teach by Teaching Them*

It is a well-known fact in librarianship that without any training whatsoever, and probably not more than a cursory treatment of information literacy in their library science degree program, many librarians will be expected to teach classes or courses as part of their job. Workshops, at the very least. Therefore, many managers are responsible for training their librarians or staff to teach, and there couldn't be a more perfect application for the concept of modeling skills to your trainees.

The academic library from Example 2.1.1 relies on graduate students and adjuncts to staff its instructional unit. This type of staff inherently turns over when they graduate or gain other employment, so the librarian in charge of the team trains new instructors regularly. Faced with this task, the librarian decided to develop a mini-course to teach new hires everything they need to know: the content of the information literacy curriculum, the student learning outcomes, the lesson plans, how to prepare for a class, how to lead classroom activities, and assessment techniques. The librarian created a syllabus containing ten learning outcomes for the mini-course, a schedule

for a week of half-day classes, homework to be completed before each session, daily lesson plans with active-learning structures, and assessments. The in-class elements all use established pedagogical techniques, such as group-work structures and guided discussions, to teach the librarians-in-training both what their students will learn and what they need to know as teaching librarians about the theories underlying the information literacy curriculum. The training librarian acts as the teacher, modeling techniques and behaviors the learning librarians will use when they are in front of a class of their own.

### **Iterating Onboarding Materials**

In the field of Human-Computer Interaction, the concept of iterative design has emerged as a process-focused practice that drives continual improvement of a product or system. When applied to onboarding, iterative design can help managers and team leaders approach the creation of their organization's onboarding experience with a mindset that acknowledges what Ranganathan observed: the library is a growing organism (1931). Iterating materials and tools used in the onboarding process relieves the pressure to create a perfect product; it recognizes that new employees are people, and that the addition of new people will bring diverse perspectives, strengths, and adaptations to every iteration of the process.

### **Establish a Foundation**

Though iteration by definition establishes an expectation of repetition and improvement, a prototype must exist for the process to begin. Most libraries will have a baseline to start from, even if the extent of that baseline is a three-inch binder full of color-coded documents. The foundation for a functioning onboarding process includes content that is applicable to the entire organization and, as a second tier, content that is applicable to specific departments, teams, or committees. When it comes to execution, you will



need a system for both documentation and delivery, ideally creating a mechanism for the two to integrate seamlessly.

Documentation can include text files of policies, procedures, or checklists. It can also include images, screenshots, videos, or interactive training. Documentation may live in an entirely digital space or certain elements may be better suited to analog formats. Some documentation requires versioning and designated archival spaces for the sake of preserving institutional memory. Creating an initial foundation for the onboarding process may reveal that your library needs to adapt or update documentation in existing formats to ensure that it is uniformly accessible by everyone in the organization—to promote transparency and inclusivity, and to build stable connections between the place the documentation lives and the point of delivery. Ideally, your new employees will access and interact with documentation through the technologies, tools, and systems that your library has already chosen and established (see section 5.2.1. and Recommended Tools in Table 5.3.2.1.). Having separate documentation and delivery mechanisms allows changes to be made to one without altering the other; linking the two then creates a template of a process that can easily be reproduced for each new hire. Finding the best combination of tools is itself a part of the iteration loop—every onboarding instance affords an opportunity to test, reflect, and refine before repeating.

To establish foundational content, start by developing documentation for the entire organization, then customize the second tier based on the team, department, or type of job. This work can be split across departments and can have the added effect of unifying language, policies, and people already established at your library. Maintaining a basic level of institutional knowledge and shared vision amongst veteran employees helps to reduce confusion about the culture and expectations for new ones. Libraries have a higher level of awareness than other organization types about the importance of institutional memory. Your organization-wide onboarding is an excellent tool for capturing and retaining those pieces of wisdom and historical procedures, and also sets the stage for effective cross training—an important efficiency measure in a modern library.

*Example: Onboarding Student Workers to Academic Libraries Using the Campus LMS*

Student workers are a vital workforce in academic libraries, but their full potential is frequently untapped by the organizations that employ them. A large academic library system has attempted to remedy this by introducing their undergraduate student workers to the philosophies and values central to librarianship.

This portion of the onboarding process takes place over several weeks and utilizes features of the campus LMS, Canvas, for both documentation and delivery. All new student employees are added to the same Canvas course site and the assignments and due dates are copied and updated for each student. Each week's folder of assignments contains checklists that link to each piece of required content. Assessments are built in Canvas as well, enabling both the student and the supervisor to track progress. The instructional content resides on a Canvas wiki in the course site, to which all library student workers have access. Because the wiki is a living document, student workers are able to collaborate, converse, and build on the existing material.

In Week 1, the content focuses locally on the student's department and their role. In subsequent weeks, the student is introduced to the library, the university library system, academic libraries, and finally to librarianship as a profession. This inspires new student workers to a greater understanding of their own role and contributions to the mission of the organization, all of which enables them to better serve patrons. Using Canvas allows documentation and delivery to exist separately but still work together. Finally, perpetual access to the growing knowledge base of the wiki encourages inclusivity and confidence for both new and veteran student workers.

## **Iterate and Update**

Once the delivery method and content for the onboarding process have been established, they are ready for deployment. When a new employee is

introduced to the library's onboarding process, the manager or supervisor should explain the iterative nature of the process and set the expectation that the employee will soon be contributing to it. One of the first tasks for a new employee is to take notes on any inaccuracies or gaps they encounter in the documentation, and any questions they have. Once they have learned the tool or system used by the library (see section 5.2.1.), they are empowered and charged to add answers, make corrections, and write new content. Not only does this update the template for the next iteration and next new employee, it also demonstrates to the current trainee that their contributions are needed, noticed, and important. In this way, your new hires will be contributing to the success of the whole organization in an important and meaningful way from the very beginning.

Due to technology evolution, librarians are well-practiced at migrating data and systems. Intentional design of an onboarding program to be iterated anticipates regular changes to information and procedures, and eventual system migration as well. The rate of change in a field like libraries is a compelling reason to design for iterative onboarding and to use a separate but linked documentation system and delivery mechanism. Although the same technology could be used for both, keeping documentation in a stable yet plastic system is a good way to be prepared for necessary changes in the future.

Table 1 lists recommended tools for developing, organizing, and managing documentation, as well as tools for delivering the tasks, schedules, and materials associated with an onboarding experience. These tools are all recommended for their feature sets and appropriateness for onboarding, as well as for the communication they foster amongst team members and between trainees and supervisors.

**Table 1. Recommended Tools for Iterative Onboarding**

Tool	Purpose	Notes
Atlassian Confluence	Documentation	The industry standard for complex documentation and easy collaboration. Version control, templates, progress tracking, threaded discussions, and inline comments are just a few features that make Confluence a favorite.

Box	Documentation	Cloud-based document management that makes sharing and collaborating on files quick and easy. Version control, integrated commenting.
G Suite	Documentation	If you're a Google Education campus, why not make use of the tools? And if you're not, G Suite is free to individual users. Google Drive, Docs, Sheets, and Slides make collaboration so easy, and are similar enough to software-based office applications that the learning curve is shallow. Use them to work across departments to establish common onboarding documentation and practices.
G Suite	Onboarding delivery	Google accounts allow task assignment. Make a fresh copy of your template Onboarding folder for new hires. Set tasks and due dates, and use the integrated communication tools to supervise the onboarding experience.
Institutional LMS (Blackboard, Canvas, Moodle)	Onboarding delivery	If your campus uses a common LMS you can take advantage of a powerful tool that your students, faculty, and staff are already familiar with. If not, Moodle is free. Using an LMS forces you to adhere to principles of instructional design (section 5.4.1.), which improves the learning experience for your trainees.
Kanban boards	Onboarding delivery	Excellent low-tech option if that's what's needed to match your budget or the personality of your team.
Trello	Onboarding delivery	Highly customizable and affordable project management tool; free version is sufficient for many teams. Bring together documentation, communication, and task management. Make a fresh copy of your template Onboarding board for new hires.

## **Techniques for Active Onboarding**

Fundamentally, onboarding is about learning. New employees are learning a new environment, a new team, a new culture, a new role, and a new set of skills. Using active learning techniques from the field of education will help new employees retain knowledge and take ownership of their onboarding experience. Active learning is “anything that involves students in doing things and thinking about the things they are doing” (Bonwell & Eison, 1991, p. 2), or anything that requires engagement beyond

passive knowledge consumption like listening, reading, or watching a video. As a general rule, you should facilitate the onboarding process in the way you would teach a skill in a class or workshop. Weave in the following techniques to inspire meaningful learning and action from your recruits.

### **Employ Instructional Design Principles**

Educators use instructional design principles to ensure they create materials that are effective for all types of learners. Refer to a comprehensive resource like *E-Learning and the Science of Instruction: Proven Guidelines for Consumers and Designers of Multimedia Learning* for a deeper look at how the design of learning objects affects their efficacy for learners (Clark & Mayer, 2016). While instructional design is an entire field of study, these selected principles are particularly applicable to onboarding new employees:

- *Specify learning outcomes.* Be explicit about the things the employee will learn, and communicate expectations at the beginning of the onboarding process. A simple formula for crafting a learning outcome is: Who (the learner) + How (action verb) + What (the skill). Determine the learning outcome, and then work backwards to figure out what content the learner requires to be able to achieve the outcome. This practice ensures that new employees are provided adequate information and learning experiences, but helps to avoid inclusion of everything but the kitchen sink.
- *Incorporate assessment.* Notably different than evaluation or testing, assessment gives your new hire tangible feedback on their progress and a clear vision of what's needed to meet requirements. Assessment may happen formally or informally, but once again, it's important to describe upcoming assessment practices at the beginning of the onboarding process.
- *Require reflection.* Starting a new position implies a certain amount of information overload, especially in the first few days on the job. Building in designated and consistent time for reflection can help

alleviate mental fatigue and improve retention (Levitin, 2014). Try incorporating reflection into individual training activities as well as the overall days, weeks, or months of the entire onboarding process (more on this strategy in section 5.4.3.).

- *Design universally.* Creating an onboarding experience that recognizes individuals and the various ways they learn is one way to apply the principle of Universal Design for Learners. Make sure that all onboarding materials meet accessibility standards, then improve further by providing multiple ways of engagement, representation, action, and expression. (For more information see the Universal Design for Learning Guidelines developed by CAST).

*Example: Applying Instructional Design Principles to a Public Services Training Activity*

An academic library provides virtual reference through an online chat service embedded on the library's website. The library is committed to providing high-quality customer service and has collectively established a set of values to guide and guarantee this level of service. Every employee who staffs the chat service is trained in applying the values to virtual reference during their onboarding process. This training activity takes place after the new hire has become proficient in virtual reference technologies as well as most library resources. The activity is self-guided, with the following instructions. Instructional design principles are noted:

In this training, you will apply the library's customer service values in a virtual chat scenario (Learning Outcome). At the conclusion of the activity, you will analyze your chat transcript using the department's rubric (Assessment). Once your analysis is complete, you may reflect on your performance by writing a short review to share with your supervisor, verbally discussing the activity with a colleague, or repeating the exercise and noting improvements. (Require Reflection + Design Universally)

**Customize for the Individual**

A self-directed onboarding process gives your new employee instant autonomy and ownership. Monitoring progress via the delivery tool and supervisor meetings serves as a checks and balances system, while giving the employee the freedom to drive their own learning empowers them. Consider including competency-based training, and allow new hires who can demonstrate proficiency or expertise in an area to skip the detailed elements of training. This will discourage both annoyance and boredom!

Acknowledge variations in learning styles by building flexible materials. Give the new team member the opportunity to choose how to learn as much as possible by incorporating video, text, interactive modules, on-the-job training or shadowing, and self-teaching (in which the learner seeks out their own materials on a given topic). Find opportunities to offer choices that the learner can make to customize their experience, especially for employees hired into positions above entry level. Provide checklists of required competencies to make the trainee accountable for their learning choices. Assess the value of different types of learning methods by requesting feedback from team members who have used them and by measuring their achievement of learning outcomes, and adjust future iterations of your onboarding process as needed.

**Use Conversation and Feedback to Ensure Success**

Empathetic and efficient communication is central to an organization's health, and onboarding is the ideal place for a library's unique communication style to be introduced and absorbed by employees joining the team. Strategically integrating communication habits into onboarding also capitalizes on the iterative nature of the process and reinforces multiple instructional design best practices.

When a new hire arrives and begins the onboarding process, outline all options for discussion and question asking. For example, take advantage of the communication channels native to the delivery and documentation tools that you are using; discussion can happen alongside the content by utilizing threaded discussions and in-line comments. Answering a new employee's

question about a policy directly in the documentation also ensures that the answer is available to future (and current!) employees, instead of lost in individual email accounts. Giving employees access to this organically-created knowledge base generates inclusivity through transparency. Many of these tools also offer integration with chat applications like Slack or Google Hangouts, which afford the freedom of spontaneous, real-time conversations. And of course, face-to-face talks (or video chats, if the employee is remote) are crucial to relationship building.

While these conversations should happen freely and with flexibility throughout the entire onboarding process, it's also helpful to add some structure and formality in order to guarantee an adequate amount of feedback is given. Expectations of all kinds (for job duties, communication, skills, etc.) should be given to the new hire as soon as possible, along with a timeline that clearly defines target milestones and proficiency levels. Will the new employee begin chairing a committee in their fourth month on the job? Include this in their personalized onboarding schedule along with the knowledge and skills they'll need to master in order to be successful as the committee chair. This allows the employee to learn without pressure while maintaining expectations for growth and progress. Build time into the schedule for frequent check-ins, especially in the early days of the employee's tenure at the library. These conversational appointments should happen with various individuals (not only the supervisor) in order to provide multiple perspectives. Reflection and feedback can occur organically, but calendaring the time ensures that such conversations are not lost to busyness. These conversations have the added benefit of encouraging autonomy, building trust, and making the new employee feel like part of the team.

## CONCLUSION

Developing an onboarding experience that is active and adaptable will take it time; it may be slowed down by bureaucratic hoops to jump through or the need to get buy-in from the larger organization, and it may reveal deeper issues with the library's culture or operations. But even if all these



potential challenges come to pass, the payoff for persevering is worth the time spent in designing an onboarding process. Your efforts to onboard your new hires need not be perfect—each iteration will be an improvement over the last, and you will continually learn and generate new ideas. This process can improve employee retention and inspire positive change to your library’s workplace culture. Every fulfilling library career begins with a great first day at a new job, made possible by a manager who cares enough to make it great.

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