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Design and Development of an Onboarding eLearning Course Utilizing the Addie Model for a Nonprofit Association

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Consultancy Project Executive Summary

Organization: Gardner-Webb University College of Education

Project Title: DESIGN AND DEVELOPMENT OF AN ONBOARDING
ELEARNING COURSE UTILIZING THE ADDIE
MODEL FOR A NONPROFIT ASSOCIATION

Candidate: Kortney Peterson

Consultancy Coach: Dr. Conrad Martin

Defense Date: November 11, 2022

Authorized by: Marque Macon, President, NAHSE North Carolina Chapter

Approval

This consultancy project was submitted by Kortney Peterson under the direction of the persons listed below. It was submitted to Gardner-Webb University College of Education and approved in partial fulfillment of the requirements for the degree of Doctor of Education at Gardner-Webb University.

Conrad Martin, EdD, Faculty Advisor
Gardner-Webb University

Date

Marque Macon, Site Manager
President, NAHSE North Carolina Chapter

Date

Acknowledgements

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Abstract

DESIGN AND DEVELOPMENT OF AN ONBOARDING ELEARNING COURSE UTILIZING THE ADDIE MODEL FOR A NONPROFIT ASSOCIATION. Peterson, Kortney N., 2020, Consultancy Project, Gardner-Webb University.

The National Association of Health Services Executives (NAHSE) is a nonprofit association of Black health care executives founded in 1968 for the purpose of promoting the advancement and development of Black health care leaders and elevating the quality of health care services rendered to minority and underserved communities. The NAHSE North Carolina Chapter (NAHSE NC) focuses on building engagement and collaboration with minority groups in health care while ensuring that the chapter membership is both professionally and personally rewarding through professional and educational opportunities, mentoring, scholarships, internships, and community service (NAHSE NC, 2022). The purpose of this project was to design and develop an engaging onboarding eLearning course utilizing the ADDIE instructional design model for NAHSE NC. The development of an onboarding course is vital to the success of an onboarding program because it offers a dynamic opportunity for new members to learn the mission, vision, values, strategic priorities, and membership opportunities. Additionally, the course improves engagement, boosts member retention, and assists in the professional success of the member by appropriately acclimating them to the chapter. The integration of the onboarding course will address the challenge of NAHSE NC's strategic objective to elevate and expand brand awareness and visibility by increasing the engagement of new members and optimizing the ability to convert prospective members to new members by highlighting the chapter's comprehensive membership opportunities and benefits. To

comply with the strategic objective, NAHSE NC took a proactive approach to implement a consultancy project to identify and address the chapter's onboarding initiative.

Keywords: onboarding course, National Association of Health Services Executives, NAHSE, NAHSE NC, ADDIE, instructional design, eLearning

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1 Introduction

1.1 Project Purpose

The National Association of Health Services Executives (NAHSE) is a nonprofit association of Black health care executives founded in 1968 for the purpose of promoting the advancement and development of Black health care leaders and elevating the quality of health care services rendered to minority and underserved communities (NAHSE NC, 2022). The NAHSE North Carolina Chapter (NAHSE NC) is focused primarily on building engagement and collaboration with minority groups in health care while ensuring that the chapter membership is both professionally and personally rewarding through professional programs, educational opportunities, workshops, mentoring, scholarships, internships, and community service. Since its inception, NAHSE NC has maintained a proud reputation of honoring diversity and inclusion and is recognized statewide as the premier professional membership association for Blacks in health care.

The purpose of this project was to design, develop, and implement an onboarding eLearning course utilizing the ADDIE instructional design model for NAHSE NC. The instructional designer, or course developer, applies this systematic framework methodology to design and develop training content and courses to support the acquisition of new knowledge or skills. The ADDIE model is a 5-phase acronym that stands for analyze, design, develop, implement, and evaluate that is utilized by instructional designers to logistically plan the development of effective course design for learning experiences. The model is meant to be completed in sequential order, from analysis to evaluation. Instructional designers find this framework very useful because having stages clearly defined facilitates the implementation of effective and engaging learning solutions.

The onboarding course will solve one of NAHSE NC's strategic objectives to expand brand awareness and visibility by creating a vital learning solution to add to their current onboarding program to ensure efficient acclimation of new and prospective members to the mission, vision, values, and membership opportunities of NAHSE NC.

Technical Terms and Definitions

Instructional Design. The design, development, and delivery of learning experiences.

Instructional Designer. Develops courses based on the unique business and learning needs of the client.

ADDIE Model. A 5-phase instructional design methodology utilized as a framework in designing and developing educational and training programs. The five phases include analysis, design, development, implementation, and evaluation.

NAHSE. Nonprofit association of Black health care executives founded in 1968.

NAHSE NC. North Carolina chapter supporting members across the state. The focus of the chapter is to serve as a convenor, connector, and collaborator for minority groups in the health care field.

Articulate Rise 360 Authoring Tool. A web-based eLearning course builder platform that allows instructional designers to develop online courses for any device (desktop/laptop computer, tablets, smartphones).

Alpha, Beta, Gold Course Iterations. Course content development stages.

1.2 Associated Documents

Training Needs Assessment Questionnaire. Questionnaire utilized during the Training Needs Assessment session to identify the business need, current state of training, intended future state, performance/knowledge gaps, project scope, risk/mitigation plan, learning objectives, outcomes, and competencies (see Appendix A).

Project Plan. Timeline of project deliverables and due dates placed in chronological order to track project progression (see Appendix B).

Storyboard. Outline of course design, including script and multimedia placement, interactions, and timing. The learning content is outlined in a lesson format (see Appendix C).

NAHSE NC Onboarding Course. eLearning course developed in Articulate Rise 360.

1.3 Project Plan Maintenance

The project plan was written under the direction and assistance of Marque Macon, the President of NAHSE NC, and me, the DEOL student. Additional changes to the project plan were completed by me, with the approval of Marque Macon, and resubmitted to Dr. Conrad Martin for final approval.

2 Project Scope

2.1 Outline of Partnering Organization's Objectives

2.1.1 Objectives

- Elevate and expand brand awareness and visibility of NAHSE NC through the development and implementation of an onboarding course in Articulate Rise to increase the engagement of new members and prospective members.
- Efficiently acclimate new members to NAHSE NC through the delivery of an onboarding course to outline the mission, vision, values, strategic priorities, executive board, senior advisory board, professional committees, and membership opportunities.
- Promote the value of NAHSE membership and engagement in advancing health equity within North Carolina.

2.1.2 Success Criteria

At this juncture, NAHSE NC will continue to accept new members and plans to administer a survey to obtain data and measure feedback on the effectiveness of the onboarding course in April 2023.

2.1.3 Risks

There is minimal risk associated with this project; however, two risks were identified:

- Partnering organization's failure to review the three course iterations (alpha, beta, gold) and provide sufficient feedback in a timely manner.
- Inability to gather adequate feedback from the consultancy site during the training needs assessment. This would serve as a risk because the output data are utilized for effective course development.

2.2 Outline of Student's Objectives

2.2.1 Objectives

- Facilitate a Training Needs Assessment utilizing a comprehensive questionnaire to identify knowledge gaps and establish a clear understanding of the desired objectives/needs for the onboarding course from the consultancy site.
- Serve as the instructional designer to develop a storyboard and onboarding course in Articulate Rise applying the systematic methodology of the ADDIE 5-phase model.

- Design, develop, and implement an onboarding course to increase brand awareness and visibility for NAHSE NC and raise the engagement of new members and prospective members.
- Strategically design an engaging and interactive onboarding course that objectively represents the mission, vision, values, strategic priorities, and membership opportunities of NAHSE NC.

2.2.2 Success Criteria

The success of the project was measured through the consultancy site approval of the storyboard, as well as the three completed iterations of the course (alpha, beta, gold) ensuing the ADDIE model methodology, excluding the final phase, evaluation. NAHSE NC plans to conduct surveys to obtain feedback on the design, delivery, and effectiveness of acclimating new members using the onboarding course in April 2023.

2.2.3 Risks

- Lack of communication from the consultancy site to discuss course progress/updates
- Lack of versioning feature built into Articulate Rise which restricts the ability to revert to a prior version of the course
- Technical support issues in Articulate Rise for course development (i.e., Articulate Rise crashes during course development)
- Consultancy site project scope changes to no longer prioritizing the need for an onboarding course mid-way through the project or after development is complete

2.3 Definitive Scope Statement

The project utilized the ADDIE model to develop and implement a new member onboarding e-Learning course to increase brand awareness and visibility of NAHSE NC, as well as ensure suitable onboarding (integration) of new members.

3 Deliverables

3.1 To Partnering Organization

Below is a list of the formal deliverables and the projected/estimated due dates.

Deliverable	Description	Forecasted Date
Training Needs Assessment Questionnaire	Questionnaire utilized during the Training Needs Assessment to identify the business need, current state of training, intended future state, performance/knowledge gaps, project scope, risk/mitigation plan, learning objectives, outcomes, and competencies (see Appendix A).	April 2022
Project Plan	List of deliverables and due dates placed in chronological order to track project progression.	May 2022
Storyboard	Outline of course design, including script and multimedia placement, interactions, and timing. The learning content is outlined in a lesson format (see Appendix C).	May 2022
Onboarding Course (Iteration 1- Alpha)	Initial version of course	June 2022
Onboarding Course (Iteration 2- Beta)	Second version of course, incorporating consultancy site edits	July 2022
Onboarding Course (Iteration 3- Gold)	Third and final version of course, incorporating consultancy site edits	August 2022
Course Delivery to Consultancy Site	Gold iteration, incorporating consultancy site edits is delivered to consultancy site for implementation.	September 2022
Course Feedback Survey	Survey to obtain feedback from new members on the effectiveness of the onboarding course.	April 2023

3.2 From Student

There are no additional deliverables.

4 Project Approach

4.1 Project Lifecycle Processes

The origin of the project stemmed from NAHSE NC's strategic priority to expand brand awareness and visibility by increasing engagement of new members and optimizing the likelihood of converting prospective members to new members. As an educator who has worked in the learning and development field for 12 years within the health care sector, I understood the dire need to effectively onboard new members as it builds a lasting impression and cultivates collaboration, mentorship, and leadership. I utilized my instructional design and adult learning knowledge to develop a quality learning solution for the site in Articulate Rise. Articulate Rise is a web-based eLearning course builder platform that allows instructional designers to develop online engaging and interactive courses.

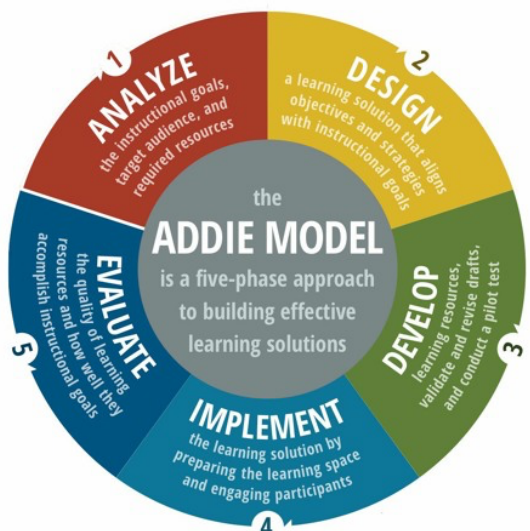
The project was only split into four phases of deliverables aligning with the ADDIE model: analyze, design, develop, and implementation. The project excluded the final stage: evaluation. It is important to note that the ADDIE model is a 5-phase instructional design framework: analyze, design, develop, implementation, and evaluation; however, this project focused primarily on the completion of four phases because the consultancy site is slated to conduct evaluations in April 2023. I worked with Marque Macon, site manager for the consultancy site and NAHSE NC president, as well as Renna Berry, NAHSE NC secretary.

The project began with the analysis phase to gather pertinent details on NAHSE NC, as well as the particulars for the course such as the target audience, goals and objectives, and knowledge gaps. It concluded with the design phase where I created a storyboard to outline the course content into a lesson format, as well as an Articulate Rise course template utilizing the consultancy site's specific branding. During the develop phase, I was tasked with utilizing the storyboard to create the first, second, and third iterations of the course (alpha, beta, gold). Throughout the course development process, I maintained close communication with the consultancy site to ensure adequate feedback was received to ensure optimal project success.

The ADDIE Model for Course Development

The development of the course in Articulate Rise tracked the sequential framework of the ADDIE model, starting with the analysis phase and concluding at the implementation phase.

The ADDIE Model



R. M. Branch (2009). *Instructional design: The ADDIE approach*. Springer.

Project Lifecycle Process

Phase 1: Analysis	<ul style="list-style-type: none"> • Conduct introductory discussion with the NAHSE President and Secretary to identify the problem, discuss task analysis, and opportunities for collaboration. • Obtain consultancy project approval • Develop Training Needs Assessment Questionnaire to assess current state of training and gather data to identify target audience, knowledge gaps, learning objectives, risks/mitigation plan, proposed course layout, and resources. • Facilitate Training Needs Assessment with the consultancy site to gather responses to questionnaire and discuss next steps.
	<ul style="list-style-type: none"> • Develop project plan • Review project plan with the consultancy site and obtain feedback/approval. • After approval is obtained, start the design phase.
Phase 2: Design	<ul style="list-style-type: none"> • Determine the appropriate e-Learning authoring tool for course development and build a storyboard showcasing the framework of course content to convey the general vision, including course script, image/video placement, and interactivity blocks. • Send storyboard to consultancy site for approval. • Upon approval of comprehensive storyboard, begin the development phase.

Phase 3: Development	<ul style="list-style-type: none"> • Create a video to embed in course and research appropriate images for lessons. • Build out course template to include interactive and engaging blocks and NAHSE NC branding. • Begin course development aligning the course layout with the approved storyboard. • Develop the Alpha (version 1) • Conduct a pilot test of the course to ensure no technical issues exist. • Send Articulate Rise review link to consultancy site to request feedback by indicated date. • Update course with Alpha revisions. • Develop the Beta (version 2) • Conduct a pilot test of the course to ensure no technical issues exist • Send Articulate Rise review link to consultancy site to request feedback by indicated date. • Update course with Beta revisions. • Develop the Gold (version 3) • Conduct a pilot test of the course to ensure no technical issues exist • Send Articulate Rise review link to consultancy site to request feedback by indicated date. • Update course with Gold revisions. • Conduct a pilot test of the course to ensure no technical issues exist. • If the course is clear of technical issues, sent the consultancy site the Gold (Final) version of the course. • Advise the consultancy site to contact me should they encounter any issues during the course implementation. <p>Throughout the analysis, design, and development phase, I maintained constant communication with the consultancy site to ensure project success.</p>
Phase 4: Implementation	<ul style="list-style-type: none"> • Onboarding course is rolled out and implemented by the consultancy site.
Phase 5: Evaluation	<ul style="list-style-type: none"> • This phase will not be conducted by the consultancy site until April 2023.

4.2 Project Management Processes

I served as the lead in managing all aspects of the project. Monthly meetings were conducted to provide project status updates and address needs, challenges, or barriers to project timeline and progression. All project changes were discussed and approved during the touch base meetings.

4.3 Project Support Processes

Throughout the duration of the project, I developed and managed all project timelines and completed course developer work to ensure timely completion of the onboarding course. The president and secretary of NAHSE NC continuously reviewed course updates and provided feedback to maintain effective collaboration and ensure the project plan was adhered to.

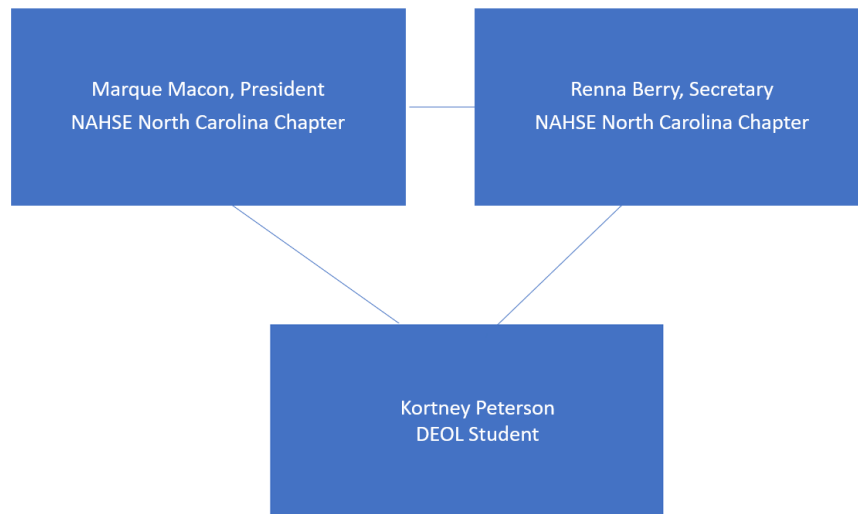
4.4 Organization

4.4.1 Project Team

The project team included the following members:

- Marque Macon, President, NAHSE NC
- Renna Berry, Secretary, NAHSE NC
- Kortney Peterson, DEOL Student

4.4.2 Mapping Between Organization and Student



5 Communications Plan

Stakeholder	Information Required	Justification	Due Date/ Delivery Format
The DEOL Student	<p>NAHSE NC PowerPoint Presentation detailing the following:</p> <ul style="list-style-type: none"> • NAHSE Logo and Branding Guidelines • NAHSE website link to pay membership dues • Membership rates for chapter members (per tier) • Photos of Senior Advisory Board and Executive Board members • 2022 Strategic Priorities • Membership Benefits & Institutional Membership Benefit Details • Committee Overviews • Link to Calendar of Events <p>Chapter Documents:</p> <ul style="list-style-type: none"> • Operating Manual - pdf • NAHSE NC Elected Board Member Roles and Responsibilities-pdf 	All documents are required for the storyboard build and content development of the onboarding course to ensure utilization of NAHSE NC specific branding, website links, images, reference documents, and membership details.	<p>May 2022</p> <p>Delivery Method: Email</p>
NAHSE NC President and Secretary	Training Needs Assessment Questionnaire	Assess current state of training and gather data to identify target audience, knowledge gaps, learning objectives, risks/mitigation plan, proposed course layout, and resources.	<p>April 2022</p> <p>Delivery Method: Email</p>
NAHSE NC President and Secretary	Project Plan	Chronological timeline outlining project from inception to completion highlighting deliverables and due dates	<p>May 2022</p> <p>Delivery Method: Email</p>
NAHSE NC President and Secretary	Storyboard	Outline of the core elements for the onboarding course, including script and multimedia. The learning content is outlined in lesson format.	<p>May 2022</p> <p>Delivery Method: Email</p>

NAHSE NC President and Secretary	Alpha - Version 1	Send Articulate Rise onboarding course review link to consultancy site for review and to provide feedback to ensure course content is accurate. All course feedback is documented on Review link in Articulate Rise.	June 2022 Delivery Method: Email
NAHSE NC President and Secretary	Beta - Version 2	Send Articulate Rise onboarding course review link to consultancy site for review and to provide feedback to ensure course content is accurate. All course feedback is documented on Review link in Articulate Rise.	July 2022 Delivery Method: Email
NAHSE NC President and Secretary	Gold - Version 3	Send Articulate Rise onboarding course review link to consultancy site for review and to provide feedback to ensure course content is accurate. All course feedback is documented on Review link in Articulate Rise.	August 2022 Delivery Method: Email
NAHSE NC President and Secretary	Deliver final version of course	Deliver final version of onboarding course to consultancy site to satisfy project requirement.	September 2022 Delivery Method: Email
NAHSE NC President and Secretary	Recurrent updates on project progression	Ensure the lines of communication are open and expectations are continuously met	May 2022 – October 2022 Delivery Method: Email and Zoom

6 Work Plan

6.1 Work Breakdown Structure

Phase	Responsible	Due Date
Phase 1: Analyze		
Introductory discussion with NAHSE president and secretary to discuss project scope and the goals and needs surrounding the development of an onboarding course. Obtained project approval.	NAHSE NC and DEOL Student	April 2022
Create questionnaire and conduct Training Needs Assessment to gather details regarding: Target audience Goals and objectives Knowledge gaps Risk/mitigation plan Preferred course layout Interactivity	DEOL Student	April 2022
Request NAHSE PPT and membership information for course development	DEOL Student	May 2022
Develop project plan	DEOL Student	May 2022
Obtain approval of project plan from consultancy site	DEOL Student	May 2022
Phase 2: Design		
Research and select course authoring tool for development aligning with consultancy site's requirements to ensure efficient training delivery	DEOL Student	May 2022
Create measurable learning objectives	DEOL Student	May 2022
Develop the Storyboard to include the following: <ul style="list-style-type: none"> • Script and fonts • Lesson outline (Map time frame for each lesson) • Media placement (audio, video) • Image placement • Document uploads placement 	DEOL Student	May 2022

Meet with site to review Storyboard and selected images and video, obtain approval to move forward to the development phase	NAHSE NC and DEOL Student	May 2022
Phase 3: Develop		
Develop course template in Articulate Rise, aligning with the approved Storyboard. Follow NAHSE branding guidelines and design elements.	DEOL Student	June 2022
Create animated video to embed in course introduction lesson	DEOL Student	June 2022
Create infographics	DEOL Student	June 2022
Alpha Iteration: After the alpha course is complete, test for system glitches. If there are no “bugs” in the development site, send the alpha version to the consultancy site via the Articulate Review Link for review and feedback by assigned date. After receiving feedback, make edits and check the course for glitches.	DEOL Student	June 2022
Beta Iteration: After the beta course is complete, test for system glitches. If there are no “bugs” in the development site, send the beta version to the consultancy site via the Articulate Review Link for review and feedback by assigned date. After receiving feedback, make edits and check the course for glitches.	DEOL Student	July 2022
Phase 4: Implementation		
Gold Iteration: After the gold course is complete, test for system glitches. If there are no “bugs” in the development site, send the gold version to the consultancy site via the Articulate Review Link for review and feedback by assigned date. After receiving feedback, make edits and check the course for glitches.	DEOL Student	August 2022
Final iteration of course is delivered to consultancy site	DEOL Student	September 2022

6.2 Resources

NAHSE NC Onboarding Course Project Timeline



The following resources were needed for project completion:

- Articulate Rise 360
- Adobe Stock Images
- Storyline 360
- Microsoft PowerPoint, Microsoft Word
- Zoom Video Conferencing

7 Milestones

Milestone Number	Title	Forecast date
1	Introductory meeting with consultancy site	April 2022
2	Created training needs assessment questionnaire	April 2022
3	Conducted training needs assessment meeting	April 2022
2	Develop project scope, goals, deliverables, project timeline, and expected outcomes	May 2022
4	Develop project work plan	May 2022
5	Develop communication plan	May 2022
8	Create storyboard	May 2022
9	Develop video for course	June 2022
10	Develop Articulate Rise template	June 2022
11	Created Alpha iteration of course	June 2022
12	Created Beta iteration of course	July 2022
13	Created Gold iteration of course	August 2022
14	Completion of final course edits	August 2022
15	Delivered final onboarding course to consultancy site	September 2022
16	Develop risk assessment and mitigation plan	September 2022
17	Develop constraints and key assumptions	October 2022
18	Develop quality assurance plan	October 2022
19	Finalize executive summary	October 2022

8 Metrics and Results

NAHSE NC requested feedback on the onboarding process from their cohort of members. It was identified that there was a lack of new member knowledge in understanding the full scope of NAHSE NC and membership benefits, as well as an insufficient onboarding process. Additionally, the NAHSE NC executive board set a strategic priority to increase brand awareness and visibility in 2022. The NAHSE NC board did not formally survey the members to collect and analyze data, but the consensus was that there is a dire need for change.

As a result of the project, NAHSE NC is slated to conduct an evaluation with new members onboarded after the implementation of the course to collect feedback on the effectiveness of the course and revised onboarding process in April 2023.

9 Risks, Constraints, Assumptions

9.1 Risks

Risk Description	Mitigation Plan (what to do to avoid the risk occurring)	Contingency Plan (what to do if the risk occurs)	Impact (what the impact will be to the project if the risk occurs)	Likelihood of occurrence (e.g., %, or high/medium/low)
Lack of communication from the consultancy site to the DEOL student to discuss course progress/ updates.	Schedule monthly meetings with consultancy site and myself to maintain constant communication to assist in mitigating this risk. Meeting held in Zoom format. Additionally, maintain contact via email.	Communicate with consultancy site to determine the “why” of the lack in communication. Offer the option to create a communication strategy for project progression to mitigate the risk. The plan will serve as an agreement with all parties to ensure project success.	High	Low
Technical support issues in Articulate Rise for course development (i.e., Articulate Rise crashes during course development)	Ensure Wi-Fi connection is stable during course development in Articulate Rise since the platform is web-based. During course development, copy lesson content to a Microsoft Word document just in case course is inadvertently deleted.	Immediately contact technical support for troubleshooting and assistance.	High	Medium
Consultancy site project scope changes to no longer prioritizing the need for an onboarding	Maintain constant communication between the consultancy site and myself to keep open lines of communication to	Determine if there is another learning solution/ training aid that could be developed in lieu of the onboarding	High	Low

course mid-way through the project or after development is complete.	understand the business need and any possible fluctuations in project scope. Continuously request feedback.	course to ensure project completion.		
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9.2 Constraints

The only major constraint to this project was the lack of fiscal resources to purchase a course authoring program for the development of the onboarding course, as these tools are not free; however, I have extensive experience in the learning and development field and had access to Articulate Rise to build the course.

9.3 Assumptions

The consultancy site manager and NAHSE secretary will provide honest feedback on the development of the onboarding course (per iteration, alpha, beta, gold).

The implementation of the onboarding course will effectively increase brand awareness and visibility.

The onboarding course will better assimilate new members joining NAHSE NC.

The current challenge with brand awareness and visibility will continue to be a challenge for NAHSE NC.

10 Financial Plan

There was no financial budget for this project. NAHSE NC did not have funds available for fiscal year 2022. Having worked in learning and development for the past 12 years within the health care sector, I possess the training and technical skills required to develop the onboarding course utilizing the ADDIE model framework for the consultancy site.

11 Quality Assurance Plan



The quality assurance plan is designed to follow the PDCA cycle developed by Dr. William Edwards Deming (The W. Edwards Deming Institute, n.d.). The Deming process has four steps (plan, do, study, act). The steps focus on identifying and understanding a problem or opportunity. Once you have identified a potential solution, start to implement your action plan during the “Do” step. Next, analyze your pilot project's results against the criteria that you defined in Step 1, to assess whether your idea was a success. In the final step, this is where you implement your solution. The PDCA model has been a staple of continuous quality improvement programs for decades. It is a systematic process for gaining valuable learning and knowledge for the continual improvement of a product, process, or service (MindTools, n.d.).

Plan

I met with the consultancy site to discuss the strategic priority to increase brand awareness and visibility of NAHSE NC, as well as enhance the onboarding process for new members. During this discussion, the project scope and deliverables were identified, in addition to the setup of a meeting cadence to ensure effective communication throughout the project lifecycle. I communicated the plan to develop an onboarding course for the consultancy site.

Do

I utilized the ADDIE instructional design model to follow for course development. The model served as a guide for the project starting with the analyze phase and concluding with implementation. The consultancy site will cover the evaluation phase in April 2023. During this step, I created a training needs assessment questionnaire to collect pertinent data from the consultancy site to determine knowledge gaps, learning objectives, and preferred course layout. The needs assessment was a vital piece of the project lifecycle, as it provided me with a framework to get started with the course design.

Study

The delivery of the onboarding course satisfied the strategic priority for NAHSE NC. Although there is no evaluation data at this juncture, the consultancy site expressed immense appreciation and gratitude to me for completing the course and helping to improve the onboarding process, as well as increase brand awareness and visibility. I

was informed that the executive board was satisfied with the quality of the course delivered.

Act

NAHSE NC will initiate continuous improvement initiatives to ensure the onboarding course is updated to reflect chapter changes to avoid misinformation for new members. Additionally, NAHSE NC will update the course quarterly and facilitate an annual review to ensure the course remains innovative, engaging, and interactive for new members.

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Appendix A

NAHSE NC Onboarding Course – Training Needs Analysis Questionnaire

1. What are the goals and objectives for the course?
2. What is the problem we are trying to solve with the implementation of the course?
3. Who is the target audience?
4. What eLearning authoring platform would you like the course to be developed on?
5. What membership information, additional topics would you like a new member to be made aware of?
6. What is the desired outcome of the learning experience?
7. What is the duration of the course?
8. Is there a budget allocated to course development?
9. What are the current knowledge gaps of new members?
10. How often would you like to update the course?
11. How soon are you looking to roll out the course?
12. Do you currently have executive board buy-in for the course development?
13. Are there any risks we should consider with the development of the course? Mitigation plan?
14. Would you like to include a knowledge check in the course?
15. Would you like to include specific images/video in the course? If yes, what types of images/video would you like to include? What is the duration of video?
16. Do we need to consider accessibility in course development?
17. Are you planning to administer a survey to gather feedback on course effectiveness, format, and design? What is the date you plan to administer the survey?
18. Do you have specific branding guidelines that must be followed?
19. Do you have pdf documents you would like uploaded into the course?
20. Do any types of learning constraints currently exist?

Appendix B

NAHSE NC Onboarding Course Project Timeline

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Appendix C

NAHSE NC Onboarding Course Storyboard

Course Title: National Association of Health Services Executives (NAHSE) New Member Onboarding Course

<p>Lesson 1: Welcome!</p>	<ul style="list-style-type: none"> • Insert image • Text block <p>Learning objectives/course outline (bullets)</p> <ul style="list-style-type: none"> • History of NAHSE NC Chapter, mission, vision, values • Chapter Leadership • Strategic Priorities and bylaws • Membership opportunities and chapter committees • Resource documents, including a link to calendar of events, operating manual, and roles and responsibilities of elected board members • Contact information • List brief description of next lesson (sentence) • Create Continue block
<p>Lesson 2: About Us</p>	<ul style="list-style-type: none"> • Create video welcoming new members to NAHSE NC Chapter, develop video in Storyline 360 • Text block • NAHSE history: Create timeline blocks and include images for each block of text and list events in chronological order. • List brief description of next lesson (sentence) • Create Continue block
<p>Lesson 3: Leadership</p>	<ul style="list-style-type: none"> • Insert image • Text block • Create card block for executive board: include photo, title of board member (9) <p>Senior Advisory Board:</p> <ul style="list-style-type: none"> • Text block • Describe the “Why” behind the establishment of the senior advisory board (bullets) • Text block • Create accordion block and include photo, title of each board member (3) • List brief description of next lesson (sentence) • Create Continue block

Lesson 4: Strategic Priorities	<ul style="list-style-type: none"> • Insert image • Text block- describe the focus of strategic priorities: Recruiting, retaining, reclaiming, grow membership • Create chart to outline strategic objective and improvement priorities (4 rows, 2 columns with bullets) • List brief description of next lesson (sentence) • Create Continue block
Lesson 5: Membership Opportunities	<ul style="list-style-type: none"> • Insert image • Text block <p>Membership Benefits:</p> <ul style="list-style-type: none"> • Create 2-tab chart to include individual membership benefits and institutional membership benefits (bullets) • Text block • Include quote from current member detailing positive experience joining NAHSE NC Chapter <p>Individual Membership:</p> <ul style="list-style-type: none"> • Text block • Create interactive chart to outline individual membership type and cost (per tier) by clicking on membership option <p>Membership Dues:</p> <ul style="list-style-type: none"> • Text block • Include button (link) to pay membership dues <p>Institutional Membership:</p> <ul style="list-style-type: none"> • List institutional members (bullets) • Include button (email) to pay institutional membership fee <p>Join a Committee:</p> <ul style="list-style-type: none"> • Text block <p>Community Service & Outreach:</p> <ul style="list-style-type: none"> • Insert image • Chair name and email address (1) • List committee objectives (bullets) <p>Education & Professional Development:</p> <ul style="list-style-type: none"> • Insert image • Chair name and email address (2) • List committee objectives (bullets)

	<p>Social:</p> <ul style="list-style-type: none"> • Insert image • Chair name and email address (1) • List committee objectives (bullets) • List brief description of next lesson (sentence) • Create Continue block
<p>Lesson 6: Resources and Important Documents</p>	<ul style="list-style-type: none"> • Insert image • Text block <p>Important Links and Documents:</p> <ul style="list-style-type: none"> • Button (Link) to Calendar of Events • Upload NAHSE NC Chapter Operating Manual (pdf) • Upload NAHSE NC Elected Board Member benefits (pdf) • List brief description of next lesson (sentence) • Create Continue block
<p>Lesson 7: Connect with Us!</p>	<ul style="list-style-type: none"> • Text block • Insert image • Insert button (link) to Facebook • Insert button (link) to NAHSE email • Insert button (link) to NAHSE NC website • Insert button (link) to LinkedIn • Text block