

## SOS Submission Form

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**Chapter Name:** ATD Orange County

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**Chapter Membership Size** Medium (100-299)

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**Contact Person for This Submission:** Kimberly Goh

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**Chapter Board Position:** Chapter Secretary

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**Chapter Website URL:** <http://atdoc.org>

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**Submission Title:** New Board Member Orientation Experience (Microlearning)

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**Submission Description:** Submission Category: Administration

Incoming ATD-OC Board members needed more in-depth content and a more time-effective orientation program. Specifically, we wanted to provide them with a self-paced, personalized learning experience, that included practical activities to prepare them for their new board positions. In addition, current board members needed to be able to access specific topics to brush up on certain skills.

To meet this need, we created a New Board Member Orientation Experience, that included a one-hour kickoff meeting led by an Orientation Leader, followed by a series of self-paced microlearning modules (approximately 3 - 5 minutes each). We gave our current and incoming board members access through a dashboard on a protected page on our website.

The dashboard contains 26 microlearning modules developed in Storyline 360 and Camtasia.

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**Need(s) Addressed? Please be specific.** In the past, training for incoming ATD-OC board members was traditionally conducted as a series of live or virtual sessions with one or more orientation leaders.

Major challenges:

Finding a common time when all new members could meet  
The time was usually filled with long, drawn out explanations about tasks and responsibilities, leaving less time for strategic discussions  
Incoming board members had needs that were not being addressed

Problem Analysis:

A review of the agenda revealed that it would be beneficial to convert basic orientation information to an online, self-paced format.

The self-paced training could be completed prior to strategy meetings  
The online training modules could be developed one time, then reused year after year  
This would allow more time for initial meetings to focus on strategic discussions

The ATD-OC Board also recognized the need for a more in-depth and effective orientation program. In particular, Incoming Board Members had the following needs:

**The Need for Personalized Learning**

Some people already had significant experience using Google Drive, Gmail, and Google Docs, but others did not. Since our Board uses these tools extensively for our collaborative work, we needed an orientation program that could be personalized to match each person's skill level.

In addition, current board members also needed to be able to quickly access certain topics if they needed to brush up on specific skills.

**The Need for In-Depth Learning**

Traditionally, orientation consisted of a high level overview of how the board functions, detailed discussions about tasks and responsibilities, and answering incoming board member's questions. However many practical details, such as how to set up your board email, how to create a budget, and how to access online centralized documents were not addressed. We needed a comprehensive orientation that also included in-depth training.

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**What is your chapter's mission?**

ATD-OC's mission is to empower local professionals to effectively develop talent in the workplace. We are the space in which to practice and perfect your talent development skills and build your professional network in Orange County.

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**How does this effort align with your chapter's mission? (Please provide specific examples)**

This effort specifically aligns with our chapter's mission to "empower local professionals to effectively develop talent in the workplace." In particular, we wanted to empower our own board members to get up to speed quickly so they would be effective when they officially assumed their board positions in January. We provided time and space for them to "practice" their skills in advance, by creating an online orientation program containing practical activities. This would prepare them for their new board roles and serves as an example of effective talent onboarding.

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**ATD's mission is to "empower professionals to develop talent in the workplace". How does this submission align with ATD's mission? Please provide specific examples.**

Building talent begins at the top. This orientation builds a Board ready to assist and support our members in their learning and development needs. The orientation gives incoming board members the ability to support professionals at many levels. We showed them how they could respond to frequently asked questions, and guide professionals to appropriate resources on our website.

This project also provided an opportunity for members to collaboratively create an online orientation program that they could add to their own portfolio. Thus this project was by the members, for the members, and provided benefit across the entire member board.

This project encourages people to get involved in ATD both at the local and national level. The orientation included an overview of a number of career and professional development tools. These resources include videos, links to eLearning courses, the job board, and downloadable PDFs. After highlighting the benefits of using these resources, we encouraged incoming board members to direct others to utilize these resources as well.

The orientation highlighted the benefits of Power Membership. In that section, we describe the benefits of Power Membership, why board members should encourage everyone to join ATD National in addition to their local chapter, and where to direct people if they want to sign up to become Power Members.

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**Target Audience: (Who will benefit/has benefited from this effort?)**

Incoming ATD-OC board members now have a comprehensive training program they can complete at their own pace. The Orientation Leader saves time because now they only need to conduct a one-hour kickoff meeting to introduce the microlearning dashboard, answer questions, and provide refresher support as needed.

Now that this training is systematized, future boards will find it easier to conduct training year after year. Because incoming board members get up to speed more quickly, it boosts the effectiveness of the entire ATD-OC board, which in turn, benefits the entire chapter.

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**Costs/Resources Used: (Please include any details regarding use of resources including monetary, donations, contributions, volunteer hours, people resources, etc. and how you went about getting these resources)**

This project required approximately 300 hours of eLearning design and development volunteer time, plus additional time for board members who supported the project during the needs analysis phase, or the testing/review phase.

The eLearning Developer (Kimberly Goh, TheInteractiveStory.com) donated her time and used her own subscriptions for Storyline 360, Camtasia, and FreePik to create the modules. This project strengthened Kimberly's resume, LinkedIn profile, and personal portfolio as it was a substantial project that focused on building a robust microlearning system.

The eLearning modules themselves are hosted in ATD-OC's Google Cloud Console (which is essentially free). The links to the modules are then displayed on a protected page of the ATD-OC website, and are accessible by current and incoming board members.

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**How did you implement: (please give a brief description)**

During the needs analysis phase, it was determined that it would be best to develop microlearning modules to cover various topics. This would provide comprehensive training for incoming board members, and just-in-time training for current board members who wanted to brush up on certain skills. Because each module is short (3 - 5 minutes), it is easier for people to quickly access certain topics and fit the training into their busy schedules.

Kimberly designed and developed a total of 26 microlearning modules. The topics were determined by interviewing current and incoming board members. The microlearning modules were grouped into 4 Chapters, which could be completed in sequential order by incoming board members. However, navigation was left open so any board member could easily access a specific topic if they needed to brush up on a certain skill.

We decided the simplest and most cost-effective approach would be to house the microlearning modules in the ATD-OC Google Cloud Console, which is essentially free. Then links could be embedded on a protected page on our website, accessible only by incoming and current board members.

These microlearning modules were developed in Storyline 360, and included videos developed in Camtasia. Other tools used included SnagIt, Freepik, and Canva.

At the board level, implementation included the following steps:

Contacting all incoming board members to schedule two live kickoff calls with the Orientation Leader and the President Elect (the live 1-hour call took place via zoom. We held a total of two calls to accommodate people's schedules)

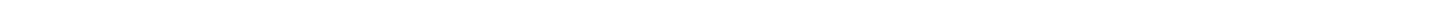
One function of the kick-off call was to build a culture of camaraderie among the new incoming board members and the incoming president. The Orientation Leader organized the call and served as the main facilitator. We started with welcome remarks from the President Elect. Then we had an activity in which everyone introduced themselves (providing a brief professional background, why they chose to join the board, what they were looking forward to in their new role).

The other function of the kick-off call was to demonstrate how to access the online Orientation program, and complete the self-paced training. For this section of the kick-off call, the Orientation leader used zoom's screen-share function for the demonstration.

The Orientation Leader provided specific information that was not included in the self-paced course (such as the current schedule for upcoming board meetings)

At the end of the kick-off call, we answered any remaining questions. Then the incoming board members began going through the online microlearning modules at their own pace. They checked in with the Orientation Leader to report their progress when they were halfway through

the course, and upon course completion.



**What were the outcomes: (Please include hard data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)**

We gathered feedback from incoming board members about the New Board Member Orientation with a survey that included the following questions:

"Did your onboarding give you a clear understanding of your job and responsibilities?"

100% responded "Yes" and rated the clarity 4.2 on a 5 point scale.

"Did your onboarding get you excited about ATD-OC's mission and values?"

100% responded "Yes"

"How satisfied are you with your onboarding experience for your role?"

100% responded "Yes" and rated their satisfaction 4.2 on a 5 point scale.

We also gathered feedback from current board members who went through the new orientation modules.

When asked to rate how satisfied they were with the New Orientation Program in contrast with the in-person onboarding they experienced previously:

On a scale of 1 - 5 (with 5 being "very satisfied"), they gave it an average rating of 4.75.

Current board members also provided the following comments:

"The current modules are extremely helpful... I love that they are also a micro-learning reference tool."

"What you have done is exactly what is needed. It's perfect - just need to add an in-person component to make it complete."

"I personally completed the virtual session - very well done."

"It was clear, concise and focused on allowing us to choose our path to learn, review and explore."

Other outcomes:

Based on our analysis, 75% of incoming board members will have completed orientation prior to the upcoming strategy meeting. This will reduce meeting time by 50% and increase effectiveness at arriving at strategic conclusions by 90%.

This reduces the cost of year-end meetings by 75% and increases Board Member onboarding engagement and job socialization by 95%.

All Storyline files have been uploaded to ATD-OC's centralized online storage folder (on the Chapter's Google Drive), and the object code files

have been uploaded to ATD-OC's Google Cloud Console.

**Lessons Learned: (hints and tips for other chapters who may be considering a similar effort)**

Each Chapter has specific needs and their own procedures, so any training programs for incoming board members will be unique to that Chapter. However, here are some general principles that might be helpful to follow:

Use a well-established development platform such as Storyline 360, so it will be easy to maintain the training system in the future. Articulate offers a 60-day free trial that includes tutorials and many templates to choose from. (The source code for Articulate Rise files currently cannot be stored without a subscription, which is why we chose Storyline 360 as our development platform).

If there are details that may change from year to year, have the Orientation Leader cover those topics during a live or virtual kickoff meeting before the self-paced training begins. Optionally, create a Frequently Asked Questions webpage that can easily be updated.

Include the New Board Member Orientation process in your calendar and your administrative tasks to be completed before the end of the year

For these kinds of training programs, it is probably not critical to track learner progress with an LMS. Instead, you can store modules on an inexpensive storage platform such as Google Cloud Console and embed the links on a protected page of your Chapter's website. For more details on using Google Cloud Console, see <https://mike-taylor.org/2017/11/11/google-cloud-platform/>

Use screen recording software such as Camtasia or Loom to demonstrate procedures. For general background on using common tools such as Gmail, Google Drive, or Google Docs, include links to YouTube tutorials.

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**Please list the specific ATD chapter resources that helped guide you in the process of completing this best practice (e.g. people, documents, policies, by-laws, etc.):**

Several members of the 2019-2020 Board provided significant support for this project:

The Chapter President, Susmitha Valvekar, played a key role in identifying the need for this New Board Member Orientation Experience.

The VP of Talent Development, Lynn Nissen and former VP of Membership, Rebecca Hartman, provided input and guidance during the needs analysis phase.

Chapter Webmaster, Laura Emery provided technical guidance on how to integrate the microlearning modules into the ATD-OC website.

Chapter Secretary, Kimberly Goh, provided the Instructional Design and eLearning Development expertise, using Storyline 360 and Camtasia for microlearning development.

President Elect, Gillian Wilson, VP of Marketing, Michele Bivens, and VP of Talent Development, Lynn Nissen tested and reviewed the modules to make sure they would meet our needs.

VP of Programs and Technology SIG leader, Paul Venderly, provided inspiration and technical training through the previous OneOC Technology SIG Project, which also focused on microlearning.

ATD-OC's policy on eLearning project development provided important guidance as well. Our policy is that eLearning programs developed by volunteers for the chapter's use need to be uploaded to ATD-OC's centralized online storage folder (on the Chapter's Google Drive) once they are complete. This applies to the Storyline 360 files developed for this project.

Similarly, the object code generated from the Storyline files have been uploaded to ATD-OC's Google Cloud Console.

ATD National's TD At Work downloadable PDF Microlearning to Boost the Employee Experience by Elise Greene Margol provided guidance and a framework for this project.

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**Please attach any documents that help support this submission: (additional documents and documents over 2MB should be sent to [sos@td.org](mailto:sos@td.org))**

<https://www.formstack.com/admin/download/file/9455287665>

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**additional supporting documents:**

<https://www.formstack.com/admin/download/file/9455287666>

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**How did you become familiar with the Sharing Our Success (SOS) program?**

Saw or heard of SOS from another Chapter Leader

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**Would you be willing to present on this submission at the ATD Chapter Leaders Conference (ALC)? \*Request for Proposals (RFPs) open in May of each year at [td.org/alc](http://td.org/alc). Selected session facilitators receive complimentary registration.** Yes

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