DESIGN DOCUMENT: ONBOARDING EVENT PLANNING TRAINING FOR FRIENDS OF BUTTE CREEK

Britte Marsh

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EXECUTIVE SUMMARY

The Friends of Butte Creek evolved from the early efforts to create a collaborative community-based organization in the Butte Creek Watershed. When it became clear that environmental concerns and opinions were being ignored, FBC formed in 1999 to advocate for stronger environmental review, protection and enhancements to the watershed.

Mission Statement: *The Friends of Butte Creek work to protect, restore and enhance the natural habitats of wildlife in the Butte Creek Watershed.*

BACKGROUND

FBC works to raise awareness and to provide protection for the future of the Last Best Run of Spring Run Salmon in California. Additional efforts of FBC include supporting the Annual Wild & Scenic Film Festival, saving trees in surrounding areas from unnecessary removal, and providing environmental education to the community.

As a non-profit, FBC is run by a board of directors all of whom are very hands-on. The core team includes founders Pamela Posey and Allen Harthorn. When selecting board members, Pamela and Allen look for those with varying expertise that can provide the support that FBC needs.

PROBLEM

FBC recently added four new members to the board of directors, creating a total of seven members. Pamela and Allen plan on adding more board members and full-time staff as the organization grows. They would like a way to share their mission and goals as well as establish a culture and passion in an efficient and effective manner to new members of the core team.

In my primary interview with Pamela and Allen, Allen mentioned that onboarding new board and team members was done informally and on an individual basis. Having to repeat the same basic information over and over again is inefficient and leaves room for error. A learning system must be in place to assure that all necessary information about the organization can be easily transferable to new members.

LEARNING GOALS

In order to develop the learning goals of the organization, I worked in collaboration with Friends of Butte Creek's core team, which includes founders Pamela Posey and Allen Harthorn, members of the Board of Directors, and a group of successful organizations previously identified by FBC's core team.

In order to identify relevant learning goals, I have conducted a series of one-on-one interviews with FBC's core team, and with members of the Board of Directors. I have also surveyed members of the Board of Directors as well as a group of successful organizations in order to establish learning priorities.

After completing the training, target learners should be able to IDENTIFY, DEFINE, and APPLY the organization's

- Policies and Procedures on marketing efforts through community event planning.

    - To recruit potential volunteers.
    - To make decisions during conflict-resolution situations.
    - To generate outreach activities/efforts with government officials, environmental organizations, community leaders, elementary and higher education teachers and institutions, and potential partners.

LEARNING OUTCOMES

Learning outcomes for the training have been designed following Robert Gagne's Types of Learning Outcomes. Under the Declarative Knowledge category, after completing the training, target learners should be able to **understand**, **define**, **identify** and **describe** the:

- Organization's Marketing efforts through community event planning.

Under the Intellectual Skills category, after completing the training, target learners should be able to:

- **Apply** the knowledge of the organization's policies and procedures provided during the training to recruit potential volunteers.
- **Apply** and **integrate** the knowledge provided during the training to outreach activities/efforts with government officials, environmental organizations,

community leaders, elementary and higher education teachers and institutions, and potential partners.

Finally, under the Attitudes category, after completing the training, target learners should:

- **Decide how to act** in order to create and maintain a diverse and inclusive organizational culture.

ESTABLISHING AND VALIDATING INSTRUCTIONAL NEEDS

Since this training will be the first formal training that the organization offers to its Board of Directors and other stakeholders, I conducted a needs assessment using the Innovation Model, as described by Smith and Ragan (2005).

I conducted one-on-one interviews with Friends of Butte Creek's founders as well as a survey, which was distributed among the current Board of Directors and some external collaborators. Both the interviews and the survey's questions focused mainly on the new knowledge, policies and procedures that the organization intends to put in place with this new training. I also focused my analysis on how these new knowledge, policies and procedures can be taught in a way that does not conflict with the existing organizational culture.

After finding general trends in the answers provided, I presented a brief report to the FBC's core team and Board of Directors in order to validate the results and to proceed with the design phase of the learning intervention. Upon agreeing with the results of the report, I proceeded to establish a communication plan in order for our team to work in close collaboration with the client.

GAP IDENTIFICATION

Friends of Butte Creek does not currently have any training in place to assure that new members of the Board of Directors, potential partners, and potential employees become knowledgeable of the organization's main procedures, mission and core values. FBC's Core Team members usually offer new members or volunteers some informal training on site, which is not the desired method to meet the organization's goals.

FBC's core team and current members of the Board of Directors often find themselves training, and responding to questions or concerns from new volunteers, potential members as well as potential employees on an individual and informal basis. The organization is expecting to grow and hopefully double in size within the next year, therefore FBC's core team's goal is to accompany that growth with a systematic way of training new members of the Board of Directors and potential employees on the values, mission and procedures of the organization. New and current members of the Board of Directors must complete and pass the online training in order to maintain their roles within the organization. Participants' score must be equal to or greater than 80% in order for the participant to pass the training.

FBC's main goal is to achieve a common understanding of the organization's culture among new members of the Board of Directors and potential employees, and the organization's core team believes that this training represents the appropriate tool to reach that goal. There is currently no training in place to meet the goals described above. Therefore, a new training is of top priority for the organization's growth.

GOAL PRIORITIZATION

The key individuals to prioritize the unreached goals are the two founders of FBC, the current and new Board of Directors members, the educational outreach professional who recently rejoined FBC, and volunteers who have been active with FBC for a considerable period of time.

The criteria for prioritizing goals include:

- Timeliness: FBC has recently increased the size of it's Board of Directors and needs to bring them on board in a timely fashion as there are important upcoming events on the organization's calendar. These events include a Film Festival that is FBC's major opportunity for fundraising and recruitment of new members and sponsors. There are also upcoming deadlines for submission of grants to various local, state, and national agencies. A recent engineering study requires analyses by the Board of Directors in order to inform decisions on the critical next steps for the development of restoration projects. Timing is also a factor in planning for community and educational outreach events to place on FBC's calendar.

- Difficulty/Ease of Attaining Goal: Some goals may be more easily attained than others. Some may have straightforward solutions while others require a more complex set of steps to attain. The level of buy-in of both instructors and learners could determine which goals may be more easily attained and therefore the order in which they should be prioritized.

- Greatest Impact: Attaining some goals may have a larger impact, either internally or externally, than others.

- Current Needs vs Future Growth: Attaining certain goals may be important/critical to continue the successful operation of FBC whereas others may be better aligned with their vision for future growth. Assuring FBC's current success and wellbeing should be a priority before addressing it's growth goals.

- Continuity/Scaffolding: Goals should be prioritized so the order of attaining them supports the larger vision of an integrated training experience. Connected learning experiences allow for deeper learning outcomes.

- Cost: The return on investment should be evaluated in terms of both cost and time commitment.

The prioritization of the goals has been determined by FBC's Core Team. The results of the survey I initially conducted showed that of the five instructional courses originally proposed, the course describing FBC's mission was deemed unnecessary due to the entry level nature of such instruction. The Grant Writing course was found to exceed learners Zone of Proximal Development (ZPD). FBC's Core Team has prioritized the Event Planning training course included in this document.

INSTRUCTIONAL NEEDS

To date, the two founders of FBC have provided only informal instruction to FBC members, outside community members, and volunteers on an as-needed basis. The founders have identified this manner of instruction as being ineffective for the current and future needs of their organization. There are currently no formal instructional training systems or materials in place to meet any of the goals described above. Therefore, the need exists to create new instructional materials.

After completing the training, target learners should be able to define, identify and describe FBC's goals, guidelines, and policies regarding community outreach event planning.

Specifically, after completing the training target learners should be able to:

- Apply and integrate the knowledge of the FBC's policies and procedures of community outreach to identify, plan, and promote events that will raise community awareness of FBC's mission, recruit new members, and raise funds via both individual donations and corporate sponsorships.

All of the goals above are defined in measurable, actionable terms. In order to achieve these goals, target learners must acquire the associated knowledge and skills required for each outcome. Therefore, these goals are reachable via new instruction/training.

The problems that have led to the identification of the goals outlined above can be traced back to a lack of knowledge and/or skills. Therefore, they are instructional needs that may be addressed through the development of targeted instructional materials and/or training.

ANALYSIS OF THE LEARNING ENVIRONMENT

Since the training will be offered on a rolling basis, instruction is going to be offered online and in an asynchronous mode. However, if additional on-site learning is needed, the ideal instructors for this specific function are the founders of Friends of Butte Creek, Pamela and Allen. They have the subject-matter expertise, are the leaders of the organization, and are role models for the board members. They have demonstrated ability to communicate via the Zoom platform, and possess the necessary interest in and enthusiasm for the materials they will be presenting. I will evaluate a blended learning solution should the need arise.

The existing curriculum consists of informal "hands-on" behaviorist-style training which teaches volunteers how to perform specific, labor-intensive tasks on an as needed basis. There is currently no formal curriculum in place for board members.

All instructors and learners have access to computers and internet connectivity. FBC does not currently have a software setup or learning management system (LMS) to integrate with, and there may or may not be the budget for paid software tools. Therefore, I will develop the course using Articulate Storyline as the means of delivering the new instruction. All resources will be available within the Storyline file.

In the current context, learners will be connecting remotely from their homes to participate in instruction. We do not anticipate that they will require access to specialized facilities of any kind.

Pamela and Allen, the leaders of the organization, have made all final decisions regarding which instructional materials are developed by myself.

The organization resides in the vicinity of Butte Creek, southeast of Chico, California. This region was significantly impacted by the Camp Fire in 2018, the deadliest wildfire in California history and the costliest natural disaster of 2018. A significant number of residents of Chico have arrived since that fire from nearby towns that were destroyed.

A particular cultural touchpoint to be aware of is the relationship with PG&E, the power utility company. It features prominently in the Mission Statement of the Friends of Butte Creek and has recently accepted responsibility for starting the Camp Fire, pleading guilty in court to 84 counts of manslaughter.

Chico is also home to California State University, Chico. Approximately 25% of the population in Chico are between the ages of 18 and 24 according to Wikipedia (compared to approximately 10% of the overall population of the US according to the Census Bureau). Some of our target learners have some affiliation with this university..

ANALYSIS OF THE TARGET LEARNERS

COGNITIVE CHARACTERISTICS	
General Characteristics	
Specific aptitudes	Target learners have the ability to convey scientific knowledge in the following fields: biology; ecology; water monitoring; river systems and processes; civil engineering; conservation; historical perspectives.
Developmental level, such as Piaget's levels of cognitive development	Formal operational
Language development level	Proficient in English
Reading level	Proficient literacy level and above (college literacy)
Level of visual literacy, ability to gain information from graphics	Experienced visual literacy
Cognitive and learning strategies	After taking the Learner Survey (Gregorc Style Delineator), 70% of learners' were determined to be concrete-sequential, and 30% were abstract-sequential.
General world knowledge	Environmental, biological and ecological systems; water and climate science; local history and demographics; political science
Specific prior knowledge	
Target learners have prior knowledge in the following fields: special education; grant writing; ADA compliance; NGO's; building contracting; higher education; gold mining; environmentalism; veteran affairs; jewelry making.	

PHYSIOLOGICAL CHARACTERISTICS

Sensory perception	Good.
General Health	Good.
Age	Average of 65.

AFFECTIVE CHARACTERISTICS	
Interests	Environmental; climate science; local demographics; political science
Motivation	Target learners share a love of Butte Creek, conservation
Motivations to learn	To become informed on organizational culture
Attitude toward subject matter	Learners are open-minded and willing to apply new knowledge to their practice.
Attitude towards learning	Receptive
Academic self-concept	Learner's believe the locus of control is within their reach. At minimum, learners' have a bachelor's degree and are comfortable with lifelong learning endeavors.
Beliefs	Progressive.

SOCIAL CHARACTERISTICS	
Relationships to peers	Long-term collaborators
Tendencies toward cooperation or competition	Cooperative, non-competitive
Moral development	Social Contract and/or Universal Principles
Socio-economic background	Financially stable
Racial/ethnic background, affiliations	Mostly white.
Role models	Founders of the organization, Allen Harthorn and Pamela Posey

DESIGN IMPLICATIONS

I have determined that an important cognitive characteristic to consider are the learner's general and specific aptitudes. Generally, all learners have earned a bachelor's, master's or doctoral degree within their fields. Their specific aptitudes vary across scientific disciplines: biology, ecology, water monitoring, fluvial geomorphology, civil engineering, conservation and history. There's also a wide variety of prior work experience and knowledge that contributes to the dissemination of organizational projects. This prior knowledge includes special education, grant writing, ADA compliance, NGO's, building contracting, higher education, gold mining, environmentalism, veteran affairs and even jewelry making. Due to this, the implications for instructional design are that learners have autonomy and control over the learning content. They follow written instructions well and need little verbal instruction to successfully complete the training. Instruction must be tailored to an audience of advanced literacy.

I have also determined that one of the more pressing considerations of designing instruction are the learner's social characteristics. The members of the Board of Directors are long-term collaborators who are committed to the organization's mission regardless of personal financial gain. Each board member is financially stable within their own career outside of FBC, yet have chosen to volunteer their time and energy to the cause. Why? Because learners share a love of environmental conservation in general, and Butte Creek specifically. Their personal interests (environmentalism, climate science, local demographics, political science) intersect with the mission of FBC. Thus, in order to be more effective conservationists, board members must become informed and able to articulate the organization's culture to outside parties.

I have determined that the learner's moral development, as defined by Kohlberg's "stages," are at minimum Stage 5 "Social Contract" up to Stage 6 "Universal Principles." According to an article in SimplyPsychology.org, Stage 5 "Social Contract" is defined as "the [learner] becomes aware that while rules/laws might exist for the good of the greatest number, there are times when they will work against the interest of particular individuals." In the same article, Stage 6 "Universal Principles" is defined as "[learners] at this stage have developed their own set of moral guidelines which may or may not fit the law. The principles apply to everyone." These are important learner characteristics to consider as the Board of Directors is motivated to learn from an outstanding ethical conviction and reverence towards their role models, Posey and Harthorn. This also means that the client (Posey and Harthorn) trusts that learner's will follow through with self-paced instruction without additional supervision. The Board *chooses* and *wants* to learn how to be effective representatives of their organization, they are *intrinsically motivated* towards a stronger performance. They are committed to completing the course in a timely manner.

TASK ANALYSIS

After completing the five sections of the training, target learners should be able to IDENTIFY and APPLY the organization's

- Policies and Procedures on marketing efforts through community event planning.
    - To recruit potential volunteers.
    - To make decisions during conflict-resolution situations.
    - To generate outreach activities/efforts with government officials, environmental organizations, community leaders, elementary and higher education teachers and institutions, and potential partners.

LEARNING OUTCOMES

After completing the training

Target learners should be able to **understand**, **define**, **identify** and **describe**:

- Organization's Marketing efforts through community event planning.

Target learners should also be able to:

- **Apply** the knowledge of the organization's policies and procedures provided during the training to recruit potential volunteers.
- **Apply** and **integrate** the knowledge provided during the training to outreach activities/efforts with government officials, environmental organizations, community leaders, elementary and higher education teachers and institutions, and potential partners.

TOOLS AVAILABLE TO THE LEARNERS IN THE PERFORMANCE CONTEXT

All Instructional materials will be delivered through Articulate Storyline.

- Slide-based presentations
- Interactive activities to maximize learner engagement
- Written guidelines and resources
- Scenario-based simulation
- Auto-graded quizzes with formative feedback

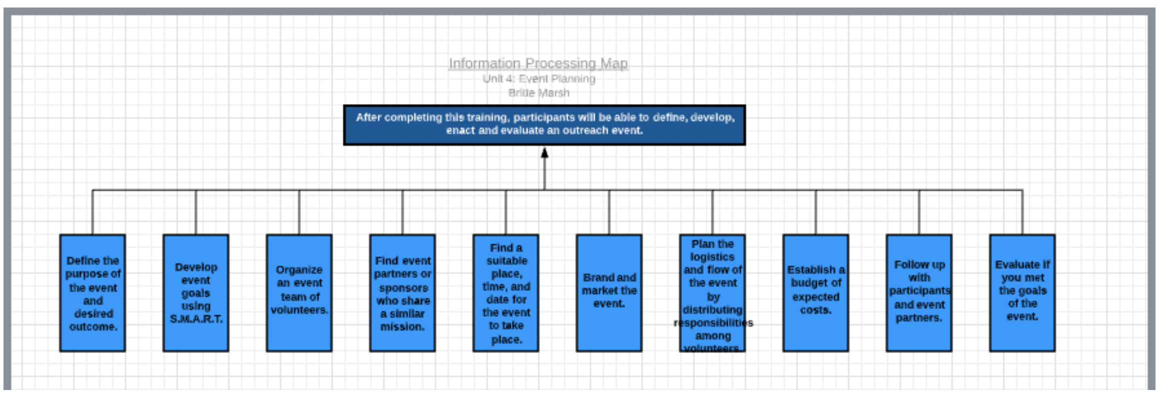
INFORMATION PROCESSING STEPS AND PREREQUISITE ANALYSIS

Learning Goal of Event Planning Course:

After completing this five-section training, participants will be able to define, develop, enact and evaluate an outreach event.

1. Define the purpose of the event and desired outcome.
2. Develop event goals using S.M.A.R.T.: Specific, Measurable, Attainable, Results, Timely.
3. Organize a team of volunteers.
4. Find coalition partners or sponsors who share a similar mission.
5. Find a suitable place, time, and date for the event to take place.
6. Plan the logistics and flow of the event by distributing responsibilities among volunteers.
7. Establish a budget of expected costs.
8. Brand and market the event using local media, social media, email blasts and word of mouth.
9. Follow up with participants and record attendance.
10. Evaluate if you met the goals of the event.

Event Planning Information Processing Map



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Prerequisite Analysis of Course

1. Define the purpose of the event and desired outcome.

1.1 Determine why the organization should host an event.

1.1a Determine what type of event would best fulfill the intended purpose.

1.1a1 Identify whether the event's intended purpose is to kick off a longer, more sustainable campaign (For example: a protest.)

1.1a2 Identify whether the event's intended purpose is to gain publicity for a particular cause or issue (For example: a movie screening.)

1.1a3 Identify whether the event's intended purpose is to fundraise for a particular cause or issue (For example: a 5k race.)

1.1a4 Identify whether the event's intended purpose is to recruit for an organization or program (For example: a happy hour.)
1.2 Given the available resources, determine what type of event is most viable.
1.2a Identify the organization's given resources.
1.3 Determine the target audience of the event.
1.3a Identify what target audience is.
1.4 Determine the desired outcome of the event.

2. Develop event goals using S.M.A.R.T.: Specific, Measurable, Attainable, Results, Timely.
2.1 Identify the "Specific" goals of the event.
2.2 Identify the "Measurable" goals of the event.
2.3 Identify the "Attainable goals of the event.
2.4 Identify the "Results" goals of the event.
2.5 Identify the "Timely" goals of the event.

[Are your goals S.M.A.R.T.? No→ Return to step 1.]

3. Organize an event team of volunteers.
3.1 Determine the minimum amount of volunteers required that is proportionate to the work.
3.2 Recruit the volunteers.
3.2a Locate the listserv, archive, spreadsheet or management system that identifies past volunteers.
3.2b Communicate the expectations for participation clearly.
3.2c Communicate and/or negotiate time for pre-event meetings and/or event timing with the volunteers.
3.2d Attain verbal or written commitments from volunteers.

[Do you have enough volunteers? No→ Return to step 2 and adjust as needed.]

3.3 Host meetings and/or trainings with your volunteers, as needed.

4. Find event partners or sponsors who share a similar mission.
4.1 Identify and contact public figures who share a similar mission and/or values as your organization.
4.2 Identify and contact organizations who share a similar mission and/or values as your organization.
4.3 Identify and contact coalitions that work on the issue area of the event.
4.4 Identify and contact businesses, clubs, or associations that can sponsor parts of the event.
4.4b Determine what goods and services may be offered in exchange to businesses, clubs, or associations to incentivize sponsorship. (For example: advertisements, shareable resources, future commitments, etc.)
4.5 Revise or establish communications channels with event partners.

5. Find a suitable place, time, and date for the event to take place.
5.1 Determine if an event partner is willing to donate a space.
5.1a Contact event partners and communicate event logistics.
5.1b Ask event partners if they have a space that is appropriate to the scope and scale of event logistics.
5.1c Ask if the space is ADA accessible and has bathrooms that are accessible to gender nonconforming participants.
5.1d Ask event partner if they're willing to donate a space for free given the time of the event.

[Is the event partner willing to donate the space, but on a different day? → Consider returning to Step 2 to revise plans in order to accommodate the change.]

5.2 Determine if there are local universities, community centers, places of worship, women- or POC-owned businesses that can provide a free space.
5.2a Contact local universities, community centers, places of worship, women- or POC-owned businesses and communicate event logistics.
5.2b Ask local universities, community centers, or places of worship, or women- or POC-owned businesses if they have a space that is appropriate to the scope and scale of event logistics.
5.2c Ask if the space is ADA accessible and has bathrooms that are accessible to gender nonconforming participants.
5.2d Ask local universities, community centers, or places of worship if they're willing to donate a space for free given the time of the event.

[Is the event partner willing to donate the space, but on a different day? → Consider returning to Step 2 to revise plans in order to accommodate the change.]

5.3 Given the selected space, identify any restrictions or regulations for the space.

[Have you determined that the restrictions and/or regulations on the space are too constrictive for the success of the event? --> Return to beginning of Step 5.]

5.4 Given the selected date, identify whether it falls on a federal and religious holiday.

[Have you determined that the federal and/or religious holiday will negatively impact the success of the event? --> Return to beginning of Step 5.]

6. Brand and market the event.
6.1 Determine what will make the event unique or exciting.
6.1a Identify feasibility of offering incentives for participants (for example: free food, giveaways, guest speakers, high quality digital posters, live music, contests, prizes, etc.)
6.2 Identify publicity resources to reach the intended audience (for example: local media, social media, email blasts, word of mouth.)
6.3 Select a communications officer for the event.

6.3a Identify a team member with strong writing and organizational skills, and who is comfortable speaking with members of the press.

6.4 Write marketing content by writing the name of the event, a catchy subject and/or headline, a compelling event description, a consistent hashtag, and the contact information of a communications officer..

6.5 Revise content to fit each type of outlet: news print, television media, radio media, social media, event listings, digital and/or print flyers, and email blasts.

6.6 Copy-edit content. (for example: errors, gender-neutral language.).

6.7 Determine if one of your team members has a pre-existing relationship with individual reporters, identify newsroom phone numbers and email of local media outlets, and deliver content to local media outlets to cover the event.

6.8 Identify popular social media platforms and event listings services and use them to publicize the event.

6.8a Engage with event partners for cross-marketing the event through their publicity resources.

6.9 Use email blasts to contact large groups directly with a "save the date."

6.10 Plan promotional "reminder" blasts via email and social media.

6.11 Train team members on how to "live" broadcast on social media platforms during the event (for example: Facebook Live.)

7. Plan the logistics and flow of the event by distributing responsibilities among volunteers.

7.1 Select a work plan application, program or system for keeping track of the steps needed to plan the event.

7.1a Identify what a work plan is.

7.1b Identify the kinds of applications, programs and systems that are accessible to author a work plan (for example: Excel, Sheets.)

7.2 Write the planning steps and deliverables into the work plan.

7.2a Identify what a deliverable is.

7.2b Determine the logistics officer(s) on your team who will oversee and supervise the completion of the work plan.

7.2c Divide planning steps and deliverables into program areas by color coding (For example: communications are blue, logistics are yellow.)

7.2d Delegate work plan tasks to team members.

7.2d1 Identify within the work plan who is the team lead and who is team support for each task.

7.2d2 Identify due dates for each task.

7.2d3 Identify how team leads will communicate the status of task completion within the work plan.

7.2d4 Provide "editor" access to team leads for the work plan document, as needed.

7.3 Select an action plan application, program or system for determining the roles and responsibilities each team member will have during the event.

7.3a Identify what an action plan is.

7.3b Identify what roles and responsibilities are.

7.3c Identify the kinds of applications, programs and systems that are accessible to author an action plan (for example: Excel, Sheets.)

7.4 Write the roles and responsibilities of each team member into the action plan.
7.4a Determine the logistics officer(s) of your team who will oversee and supervise the completion of the action plan.
7.4b Identify roles and responsibilities in the action plan by time, action, location, owner, team leader, and team support.
7.5 Determine how to manage both pre-day-of-event and on-site participant registration.
7.5a Identify the kinds of applications, programs and systems that are accessible to collect participant registration (for example: Excel, Sheets.)
7.5b Identify how to deliver promised incentives to participants who registered pre-day-of-event
7.6 Write a participant-facing agenda of the flow of the event.
7.6a Identify what participant-facing means.
7.6b Identify a member of the team who will design the agenda and who will approve the final product (for example: the communications or logistics officer).
7.6c Identify whether the agenda will be available to participants in print or online (for example: via QR code scan.)
7.7 Follow up with sponsors and partners with logistics information, as needed.
7.8 Identify a "sustainability officer" on your team who will manage the event break down and clean up.
7.8a Determine what materials are to be thrown out, recycled or saved.
7.9 Double-check that all logistics and flow roles and responsibilities are evident in the work plan, action plan and have been delegated to team members.
7.10 Determine if a dry run of the event is necessary and/or feasible.
7.10a Identify what a dry run is.

8. Establish a budget of expected costs.
8.1 Identify what a budget is.
8.2 Identify the kinds of applications, programs and systems that are accessible to author a budget (for example: Excel, Sheets.)
8.3 Identify and list expected costs for the event.
8.3a Identify materials costs.
8.3b Identify food and beverage costs.
8.3b1 Determine whether the food and beverage is accessible for participants with various dietary restrictions.
8.3c Identify fees, accommodation or travel for speakers costs.
8.3d Identify which goods can be locally sourced.
8.4 Determine whether fundraising is necessary.
8.4a Identify what fundraising is.
8.4b Identify how much expendable income the organization has available for the event.
8.4c Identify how much money needs to be fundraised.
8.4d Strategize how to fundraise the remaining costs.
8.5e Seek additional training on fundraising, as needed.

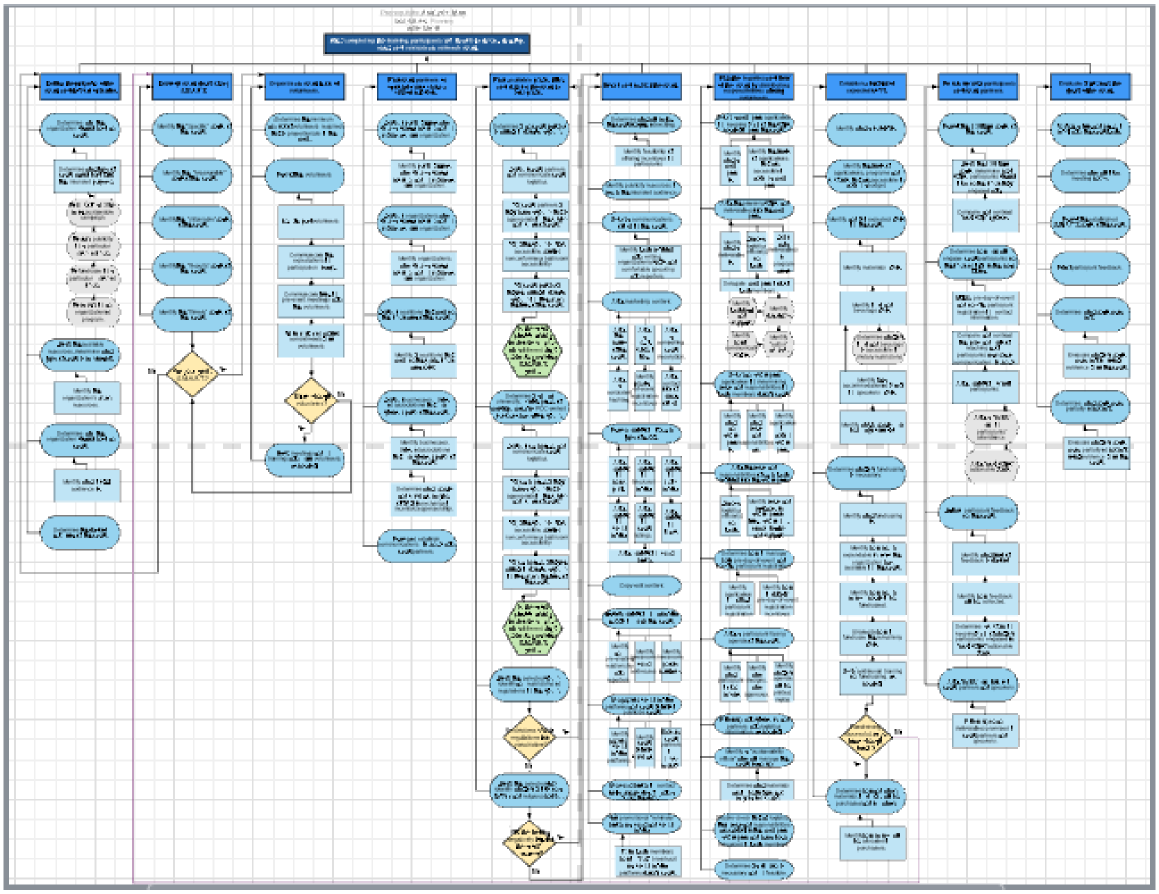
[Fundraising unsuccessful? → Return to Step 2 to revise SMART goals.]

8.5 Determine how and when materials, food, etc. will be purchased and by whom.
8.5a Identify how money will be allocated to purchasers.

9. Follow up with participants and event partners.
9.1 Revisit the long term goals of the event.
9.1a Given the long term goals, determine the immediate next steps that participants should take on the issue or topic they engaged with during the event.
9.1b Compare and contrast "next step" options (for example: attend an organizational meeting, sign a petition, call your local representative.)
9.2 Determine how you will engage event participants on the issue or topic in the near future.
9.2a Utilize pre-day-of-event and on-site participant registration for contact information.
9.2b Compare and contrast the pros and cons of reaching out to participants via various communication channels (for example: email, social media.)
9.2c Write content to send to participants.
9.2c1 Write a "thank you" for participants' attendance.
9.2c2 Write "next steps" actionable items.
9.3 Gather participant feedback on the event.
9.3a Identify what kind of feedback is desired (for example: a quantitative rating satisfaction of various aspects of the event on a scale from 1-10, a qualitative short response answer.)
9.3b Identify how feedback will be collected.
9.3c Determine a system for keeping track of whether participants engaged in "next steps" actionable items.
9.4 Write "thank you" letters to event partners and speakers.
9.4a Follow up on any deliverables promised to event partners and speakers.

10. Evaluate if you met the goals of the event.
10.1 Arrange a time and place to meet with the event team.
10.2 Determine who will take meeting notes.
10.3 Revisit the established S.M.A.R.T. goals of the event.
10.4 Read participant feedback.
10.5 Determine what goals were met.
10.5a Evaluate whether goals were met by using evidence from the event.
10.6 Determine what goals were partially or not met.
10.6a Evaluate whether goals were partially or not met using evidence from the event.

Prerequisite Map



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LEARNING OBJECTIVES

Terminal Objective:

Target Learners will be able to define, develop, and enact a community outreach event given the available funding and space resources and evaluate their success by their own pre-determined goals. In order to achieve this objective, learners must pass the assessment of this course with a passing score equal to or greater than a cumulative score 80%.

Enabling Objectives:

Target learners will...

1. Define the purpose of the event and desired outcome.

1.1 Identify the types of events an organization can host.
1.2 Identify the organization's available resources.
1.3 Identify a target audience.
1.4 Communicate the desired outcome of the event.

2. Develop event goals using S.M.A.R.T.

2.1 Identify the "Specific" goals of the event.
2.2 Identify the "Measurable" goals of the event.
2.3 Identify the "Attainable goals of the event.
2.4 Identify the "Results" goals of the event.
2.5 Identify the "Timely" goals of the event.

3. Organize an event team of volunteers.

3.1 Identify how much work is required.
3.2 Select volunteers to fulfill the work.
3.3 Locate the organization's management system that identifies past volunteers.
3.4 Communicate the expectations of participation to volunteers.
3.5 Plan meetings with volunteers.
3.6 Identify communication channels for team members.

4. Find event partners or sponsors who share a similar mission.

4.1 Communicate the organization's mission to public figures, NGOs, businesses, clubs, associations, coalitions or sponsors.
4.2 Identify goods and services the organization may offer in exchange for event partnership.
4.3 Select communications channels with event partners.

5. Find a suitable place, time, and date for the event to take place.

5.1 Communicate with event partners or local institutions and ask if they are willing to donate a space.
5.2 Identify whether an available space fulfills the needs of the event.
5.3 Identify a date and time for the event.

6. Brand and market the event.

6.1 Identify and select ways to make the event unique or exciting.
6.2 Identify publicity resources that are available.
6.3 Write marketing content for a variety of media.
6.5 Revise content to fit each type of media outlet.
6.6 Copy-edit content.
6.7 Deliver content to local media outlets to cover the event.

7. Plan the logistics and flow of the event by distributing responsibilities among volunteers.

7.1 Identify what a work plan and an action plan are.
7.2 Select applications for a work plan and an action plan.
7.3 Identify what a deliverable is.
7.4 Write planning steps and deliverables into the work plan.
7.5 Write roles and responsibilities into the action plan.
7.5 Divide and delegate tasks to team members.
7.6 Identify due dates for tasks.
7.7 Write a participant-facing agenda of the flow of the event.

8. Establish a budget of expected costs.

8.1 Identify what a budget is.
8.2 Identify the kinds of applications that are accessible to author a budget.
8.3 Identify and list expected costs for the event.
8.4 Identify whether fundraising is necessary for the event.
8.5 Delegate purchasing responsibilities to team members.

9. Follow up with participants and event partners.

9.1 Review the long term goals of the event.
9.2 Identify immediate next steps that participants can take after the event.
9.3 Identify ways to engage event participants in the near future.
9.4 Organize participant registration into an application.
9.5 Write content to send to participants.
9.6 Identify ways to gather participant feedback on their experience.
9.7 Identify what deliverables promised to event partners and speakers require further action.

10. Evaluate if you met the goals of the event.

10.1 Schedule a time and place to meet with the event team.
10.2 Write meeting notes.
10.3 Review the established S.M.A.R.T. goals of the event.
10.4 Read participant feedback.
10.5 Evaluate whether goals were met, partially met or not met using evidence from the event.

In order to demonstrate mastery, target learners must pass each individual section assessment with a score of 80% or more. Target learners are expected to demonstrate mastery of these objectives in their interactions with other members of the Board of Directors as well as with general community members.

ASSESSING LEARNING

PURPOSE OF THE ASSESSMENT INSTRUMENT

The purpose of the assessment instrument is to identify gaps in knowledge (pre-assessment) and to determine the level of competence (post-assessment) of our target learners. We are using a criterion-referenced assessment model.

KINDS OF ASSESSMENT

The pre-assessment and post-assessment instruments will serve as bookends to the training course.

I am going to use a pre-assessment instrument to identify prior knowledge and gaps in knowledge. Each section within the course will begin with a pre-assessment.

I am going to use a post-assessment instrument to assess the terminal objectives of the course. The course will end with a post-assessment.

ITEMS SPECIFICATIONS

Table 1. Assessment Item Specifications I

Objective: Supply the objective to which these specifications apply	Following the completion of Section 1 of the course, learners will be able to identify and describe S.M.A.R.T. goals.
Description of Test Form: Describe the form of assessments to be used for this objective.	The digital test will take place immediately after the completion of Section 1 and before starting Section 2 in a multiple choice format. The digital test is embedded in the Articulate software and they will be provided with a summary score after completing the test.
Sample Item: Provide a sample assessment item that is	This test consists of five multiple-choice questions. Please select one answer for each question.

appropriate for this objective. Include directions for the item.	4) Which part of the following goal represents the "T" in S.M.A.R.T.? I want my event to generate 30% more revenue from ticket sales in the next 6 months. A. I want my event to B. generate 30% more revenue C. from ticket sales **D. in the next 6 months.** Select the Next button to continue.
Question Characteristics: Describe any relevant characteristics of the question or assessment situation to be provided. These characteristics will delimit and describe the tasks that are appropriate for this objective.	Post assessment items for Section 1 will be written as multiple choice type of assessment. The test in Section 1 will consist of five items with four multiple choice options. In some cases, only one option corresponds to the correct answer. In other cases (and where specified) the learner may select all that apply.
Response Characteristics: Describe any relevant characteristics, of the responses or activities of learners who engage in this assessment.	Some of the (wrong) options provided to learners in each item reflect common misconceptions about the topic. If learners choose a wrong option, they will be presented with short formative feedback (in the form of a short explanation), upon seeing their test result, in order for learners to have a full grasp of the learning objective.
Number of Items: Prescribe the number of items of the sort described which will be needed to assess learning of this objective.	Post assessment will consist of five items.
Mastery Criteria: Describe, preferably in quantitative terms, how well a learner must perform in order	Mastery of the learning objective in post assessment of the course (Sections 1-5) will be 80% (4 out of 5 correct answers per test).

to reflect mastery of this learning objective.	

Table 2. Assessment Item Specifications II

Objective:
Identify organizations likely to sponsor your event based on previously stated criteria, such as proximity and shared goals, by itemizing a list of potential organizations with their descriptors.

Sample Item

Directions
"Knowledge Check: Help Simone identify which organizations are most likely to sponsor her event by making a list: 1 is most likely, 6 is least likely. Use the drop down boxes to put the items in order."

#1	Bottledrop Redemption Center (self-service return machines for recyclables, cash refund on site)
#2	Scrap PDX (Portland-based, resells donated arts and crafts materials and hosts green-friendly events)
#3	NW Natural Gas (Portland-based gas utilities company, website indicates concern for conservation)
#4	EnviroKelly (green lifestyle social media influencer, 150k followers on IG)
#5	U.S. Senator Jeff Merkley, D-OR (just launched a campaign called "Tackling Climate Change")
#6	Greenpeace International (HQ in Amsterdam)

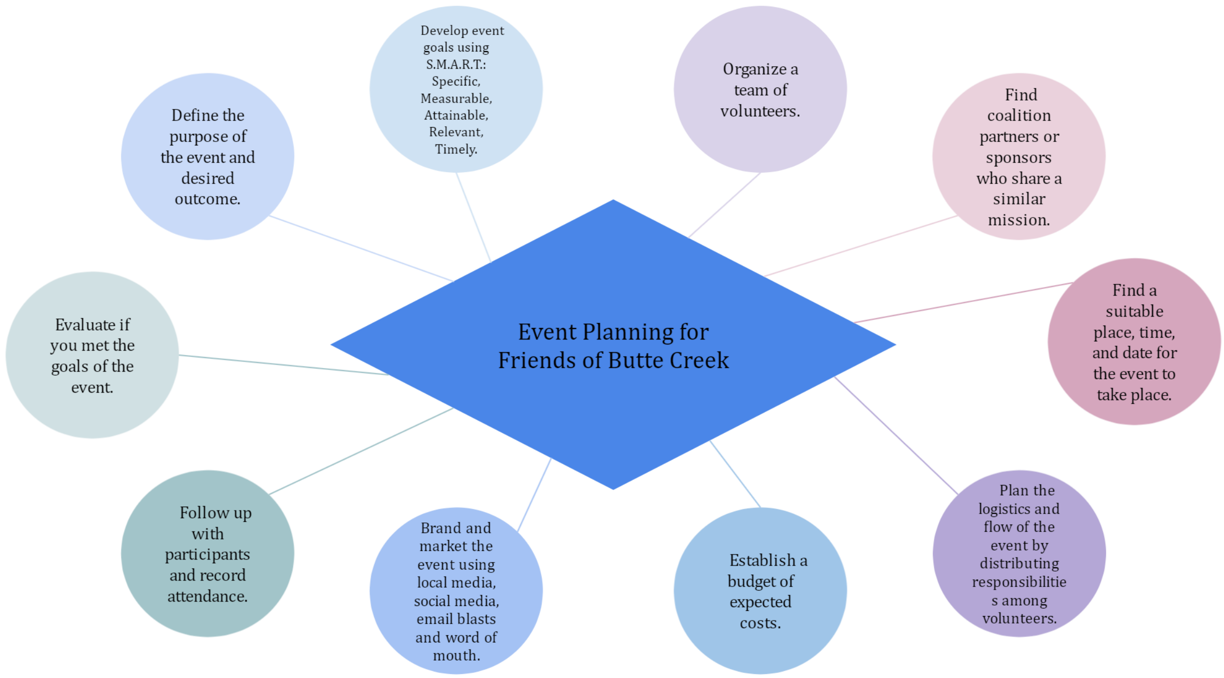
INSTRUMENT BLUEPRINT

	FORM	NUMBER OF ITEMS	CRITERION LEVEL	PROPORTION
Objective Section 1 -Define the purpose of the event and desired outcome. -Develop event goals using S.M.A.R.T.: Specific, Measurable, Attainable, Results, Timely.	Multiple Choice, True/False, Fill in the blank, and Matching items.	Total: 5 items	80%	20%
Objective Section 2 -Organize a team of volunteers. -Find coalition partners or sponsors who share a similar mission. -Find a suitable place, time, and date for the event to take place.	Multiple Choice, True/False, Fill in the blank, and Matching items.	Total: 5 items	80%	20%

Objective Section 3 -Plan the logistics and flow of the event by distributing responsibilities among volunteers. -Establish a budget of expected costs.	Multiple Choice, True/False, Fill in the blank, and Matching items.	Total: 5 items	80%	20%
Objective Section 4 -Brand and market the event using local media, social media, email blasts and word of mouth.	Multiple Choice, True/False, Fill in the blank, and Matching items.	Total: 5 items	80%	20%
Objective Section 5 -Follow up with participants and record attendance. -Evaluate if you met the goals of the event.	Multiple Choice, True/False, Fill in the blank, and Matching items.	Total: 5 items	80%	20%

INSTRUCTIONAL STRATEGIES

COURSE DIAGRAM



MACRO-ORGANIZATION OF COURSE

Due to the need for a consistent educational goal, organization, elaboration, and sequencing of content, monitoring of understanding and quick transfer of knowledge and skills, I propose to implement a supplantive model of instruction, which will yield more predictable learning outcomes.

According to the needs assessment, immediate application and integration with current projects and job performance is key to the organization, therefore I will use, at the macro-level, a combination of a Concept-Related Structure and a Utilization-Related Structure.

Training will only follow a vertical articulation of Sections within the course, in that each Section will be built upon the previous one. Learning outcomes will be focusing mainly on concepts, principles, processes and problem-solving, and all learning events will involve authentic tasks.

ORGANIZATION STRATEGY PLANS

SEQUENCING AND GROUPING OF COURSE OBJECTIVES

The following shows my sequencing and grouping of lesson objectives:

Learning Goal:
After completing this training, target learners will be able to define, develop, and enact a community outreach event given the available funding and space resources and evaluate their success by their own pre-determined goals.

SECTION 0 - Course Overview Introduction Strategy	
Deploy attention to lesson	Learners are presented with a slide titled "Did you know…?" The slide consists of recent statistics about time and money dedicated by the public towards non-profit organizations. The content demonstrates staggering numbers in terms of how much money is being donated and how many hours are being volunteered in recent years. There are also some surprise factors about *who* is donating time and money in terms of demographics.
Arouse interest and motivation	The following slide titled, "What's it all mean?" draws a connection between the previous statistics and the altruistic nature of people who work for non-profit organizations--the learner him/herself. Then, the content establishes a relationship between the learners' organization's success and their collective ability to build relationships and make meaningful contact with the public. The learner now understands that the future of their organization's viability hinges on accessing volunteers' time and donors' money.
Establish instructional purpose	The next slide is titled, "And that's why you're here." This slide introduces the course's purpose: to give learner's the knowledge and skills they need to master the art of event planning.
Preview lesson	The following slide is a bird's eye perspective of the course. It's called "Overview of Course: Event Planning". Below the title, the learner sees five columns that represent five sections, from beginning to end. Within each section are 1-3 learning objectives for that section. At the beginning of each subsequent section is the "Overview of Course: Event Planning" slide, with previously completed sections crossed

	out so learners can track their progress. Additionally, the beginning of each section includes a slide with the learning objectives on the left and the essential questions which will guide the learner through the section on the right. Additionally, at the beginning of a new lesson within each section, there is a title slide that reads with learning objectives to orient the learner that they're moving on and encountering a new lens on the previous content.
SECTIONS 1-5 Body	
Recall relevant prior knowledge	At the onset of Section 1 is a slide called "Why are you hosting an event?" (under the "Define the purpose of the event and desired outcome" learning objective") This slide shows three images of common events that learners have previously experienced. It shows a private event (a wedding), a corporate event (a conference) and a non-profit event (a protest.) Given the learner characteristics identified earlier, these events help learners to recall times that they've attended events and how each was widely different from the last. This casts a large pool of the kinds of work event planners do. However, the slide narration concludes by establishing a finite lens of what the course will address: non-profit event planning only.
Process information and examples	The learner proceeds through the Storyline slides to receive instruction based on the learning objectives. The sections present the information in the following ways: ● Defines different purposes for hosting a non-profit event and offers real-world examples of what kinds of activities are best suited to those purposes (e.g. "To gain publicity for a particular cause or issue...a movie screening.") ● Visual content identifies succinct target audience demographics (e.g. "age," "place of residence," "level of education") while audio narration offers a rationale for the importance of considering these factors (e.g. "Can't you just tell everyone about it, assume they'll be as interested as you are, and wait for the attendees to roll through on the big day? You can, but this could become expensive, time-consuming and not yield the expected results.") ● For learning objectives that have a lot of moving parts, content is broken down into smaller chunks which are organized by essential questions, and even

	sub-objectives if further breakdown is required. This is the case for the learning objective “Brand and market the event using local media, social media, email blasts and word of mouth.” One essential question that addresses the first part of this objective is “How do you write a press release?” This essential question is even further broken down to mini-objectives that are listed numerically on the slide for the learner to preview: 1) Have a Good Hook; 2) 5 W’s and an H; 3) Tell a Story; etc. Each mini-objective is “checked” off by a checkmark as the learner progresses onto the next one. Each mini-objective is accompanied with the “draft” of a written statement within a real-world press release, “do’s and don’ts,” and/or a template for employing that mini-objective. ● In general, learning objectives are addressed through explanation, examples, charts, and conventional business documents.
Focus attention	Each slide contains key information in text form as well as visually interesting photos and graphics to focus the learners attention.
Employ learning strategies	Learning content for this course is at an intermediate level. Learners are not novices to event planning nor are they experts. Learners have at minimum a bachelor’s degree and all are over the age of 50. Thus, the primary learning strategy utilized for this eLearning course is a concern for a) self-paced instruction b) reasonable cognitive load and c) immediate real world application. In regard to self-paced instruction, the content, the role of the instructor and in-person discussion has been removed. In its place are essential questions that mock the kind of dialogue that learners would engage in were this an in-person experience as well as ample interactions within the slide content to keep learner’s engaged. These interactions are designed to mock real world events the learner will encounter as relevant to course content, as knowledge checks, and to draw interest to newly presented information. In regard to cognitive load, there are slides that indicate the beginning and end of learning objectives so that a learner may choose to pause their learning experience at multiple points throughout the module--not just at its conclusion. In regard to immediate real-world application, please see the rationale provided below in the “Practice” section.

Practice	At the conclusion of content for each learning objective throughout the course, learners are tasked with a "Knowledge Check." The "Knowledge Check" slides introduce a real-world case study of non-profit event planning. The case study is about a character named Simone who has noticed an absence of recycling participation in her neighborhood and seeks to amend this by hosting a movie screening about the positive environmental impacts of recycling. Each "Knowledge Check" applies the content of the current learning objective within Simone's event planning process. For example, one learning objective in Section 3 is "Plan the logistics and flow of the event by distributing responsibilities among volunteers." In the "Knowledge Check" case study, Simone has to identify which volunteer should be delegated to which committee, based on interviews with volunteers that identified their experience level, skills and interest. On the left side of the screen is a job aid to help learners remember all the kinds of committees that exist within an event planning team (which was previously addressed and instructed upon.) On the right is the virtual realia of Simone's notes on her interviews with volunteers. Learner's have five minutes to match the appropriate volunteer to each committee in a low-stakes practice environment. A clock on the screen counts down their remaining time until the "Answers" appear in red at the bottom of the page. In many cases, there's a rationale provided along with the answers. After interacting with and completing the practice, learners move on to the next learning objective.
Evaluate feedback	In reference to the real world case study "Knowledge Checks," learners have five minutes to complete the practice task before the clocks run out and the answers appear at the bottom of the screen. Although learner's responses are not collected and formally assessed, in most cases each answer comes with a rationale that explains it. This way, learners can engage in metacognition and evaluate their own process thinking in regard to the practice task.
SECTION 6 Conclusion	
Summarize and review	After learners complete all sections and quizzes, they are redirected to a final capstone set of slides. The first slide is titled "Event Planning: What's it all mean?" and mirrors the slides learners engaged in at the very beginning of section 1 which informed them of why they were endeavoring to take

	the course. A following slide reviews the learning objectives from all five sections to review what knowledge learners have gained.
Re-motivate and close	The final slide is titled, “Here’s how you’ll do it.” This slide reminds learners that the reason they’ve learned how to plan events is because they “care” about the mission of their non-profit organization. It also reminds them that their organization needs them to ensure its future success. There’s a final call to action which urges them to “get out there and plan a stellar event.”
COURSE ASSESSMENT	
Assess performance	At the end of each module, learner’s are directed to a “Quick Quiz” which is a summative assessment of the module’s learning content. The assessment is housed within the Storyline file and includes five multiple choice or true/false questions. The content of the questions assess a mix of declarative knowledge, intellectual skills and learning enterprises as they relate to the event planning process. After each quiz at the end of each section, learner’s are directed to a Google Form (one per body section, 5 in total) to record their results and completion for the client to monitor as needed.
Evaluate feedback and seek remediation	Once a learner selects an answer to the question on the assessment, the correct answer is immediately shown, accompanied by a rationale. The learner’s performance on the quiz is archived within a Google Form (one per body section, 5 in total) that learner’s are directed to after each quiz to record their results for the client to monitor as needed. Remediation may be sought at the discretion of the client.

FORMATIVE EVALUATION PLAN

DESIGN REVIEWS AND RESULTANT REVISIONS

The design reviews will be conducted by Expert reviewers. The expert reviewers, Pamela Posey and Allen Harthorn, are the founders of the organization, who also function as SMEs for the purpose of this project.

EXPERT REVIEWERS AND UTILIZATION OF RECEIVED COMMENTS

Before instructional materials are approved for learners, I will conduct a review of the instructional materials and the assessments with the expert reviewers. The following are representative questions of the design review process:

- How well does this instruction provide a link between where the target learners currently are and where you would like them to be?
- Is the instruction appropriate for the level of the target learners?
- Is the technology easy to access or follow?
- Is the content relevant to the desired functioning of the organization?

In order to collect data regarding the review process, Experts will take the training themselves and complete a questionnaire provided in advance by the instructional design team. The questionnaire will ask for specific feedback regarding the learner experience. Some of the questions included in the questionnaire will be quantitative in nature, using the Liekert scale to measure satisfaction with the instructional materials.

After reviewing the feedback, I will schedule one-on-one interviews with the Experts in order to finalize changes to the instructional materials and the learning experience as a whole.

My main approach will be qualitative. However, any areas receiving a satisfaction score of less than 80% will be reevaluated by the instructional design team, in conjunction with the SMEs.

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