

OPWL Program Learning Goals

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WORK SAMPLES DEMONSTRATED:

- OPWL 537 Instructional Design
- OPWL 530 Evaluation

TABLE 1. OPWL LEARNING GOALS

Master's degree program learning goals	Demonstrated in which work sample?	Explanation
1. Conduct the performance improvement process in a way that is systematic.	Evaluation	A systematic approach refers to a well-organized, structured, and methodical way of addressing a problem or challenge. Through this evaluation, we followed a defined process for approaching the evaluand that was systematic in its approach by following prescribed and consistent steps through the process. Chyung's (2019) 10-step evaluation model provides a systematic approach to evaluations and was followed in completing this project. In some instances, working through the systematic steps exactly as prescribed by Chyung (2019) was not feasible due to client business requirements and the speed of data collection. This required us to do some steps simultaneously, such as determining importance weighting while collecting and analyzing data. In an unconstrained time environment, a more iterative approach would be beneficial.
2. Conduct the performance improvement process in a way that is systemic.	Instructional Design	A systemic approach involves considering the broader context and interconnected systems within an organization when designing solutions. In this project, Gilbert's Behavior Engineering Model (BEM) was used to identify the organizational and individual factors that influenced faculty engagement in applying for funding opportunities. By considering these systemic factors, a training program was developed that addressed the needs of the learners while taking into account the broader context and varying work arrangements.
3. Conduct the performance improvement process in a way	Instructional Design	The project team adhered to the American Evaluation Association (AEA) Guiding Principles and the International Society for Performance Improvement (ISPI) Code of Ethics

that is consistent with established professional ethics.		throughout the project. From the AEA Guiding Principles, the team ensured: ● Systematic Inquiry by following a thorough and methodical approach by our use of various models, such as Gilbert's BEM and Gagne's Nine Events of Instruction. ● Competence by recognizing our expertise and limitations in our conversations with the client and in our final report. ● Integrity/Honesty by being transparent and open in our communication with the client. ● Respect for People by considering the well-being of all stakeholders. We anonymized survey and interview data. ● Responsibilities for General and Public Welfare by aiming to contribute positively to society via this project that intends to support university research efforts. From the ISPI Code of Ethics, the team adhered to: ● Focus on Results by designing solutions that achieved desired and measurable outcomes. ● Add Value by enhancing the organization's performance and going above the minimum expectations and requirements of our project scope. ● Work Collaboratively by involving all relevant stakeholders. ● Be Systematic by applying a structured and methodical approach. ● Act with Integrity by being transparent and honest when communicating with our client. ● Continuously Improve by reflecting on our work and seeking opportunities for growth.
4. Conduct the performance improvement process in a way that is consistent with established professional standards.	Instructional Design	The team adhered to various professional standards throughout the project, including ISPI's Performance Improvement Standards, the International Board of Standards for Training, Performance, and Instruction (IBSTPI)'s Instructional Design Standards, and the Joint Committee on Standards for Educational Evaluation (JCSEE)'s Program Evaluation Standards. From the ISPI Performance Improvement Standards, the team ensured: ● Systematic Approach by using Gilbert's BEM, Gagné's 9 Events of Instruction, and other systematic tools. ● Collaboration by working closely with stakeholders and our team.

		From the IBSTPI Instructional Design Standards, the team followed: ● Needs Assessment by conducting a comprehensive needs assessment process. ● Design by using Gagné's 9 Events of Instruction and aligning the training with adult learning principles. ● Development by creating instructional and self-paced materials. From the JCSEE Program Evaluation Standards, we adhered to: ● Utility by ensuring our evaluation provided useful and actionable insights. ● Accuracy by using valid and reliable data collection methods. ● Accountability by being transparent about our methods and findings. In the future, the team could improve the alignment with professional standards by more explicitly documenting adherence to these standards and seeking feedback from stakeholders and colleagues to ensure expectations are being met.
5. Align performance improvement solutions with strategic organizational goals.	Evaluation	The client wanted to know how well the digital adoption platform (DAP) was being utilized and whether it provided a positive return on investment. The client further was planning on a strategic multi-year investment in the DAP technology, but lacked the data to help make a decision. The evaluation findings were essential in identifying the value and helped build a business case that supported this strategic investment. Ultimately, the client used the evaluation findings to invest an additional \$600,0000 for DAP implementations.
6. Make recommendations that are designed to produce valued results.	Evaluation	The stakeholders considered evaluation of the current state of WalkMe's impact on end users and areas for improvement as valued results. WalkMe was part of training for a pilot group of learners (~620). The entire business unit rollout of training for about 2,000 users occurred in July 2022, after this project wrapped up. However, the evaluation informed what went well and what changes needed to be made to improve the learning experience for the rollout. The project team's recommendations improved the program in the following ways:

		● Timing: training was delivered when Salesforce was ready to be used. Previously, training was completed even though some users did not have access for weeks after the training. ● Asynchronous: the survey and interview data suggested that instructor-led training often became a troubleshooting exercise. To avoid this, more asynchronous activities were designed. Data indicated that using WalkMe had a positive correlation with high-value activities, so more WalkMe content was designed. This trend has continued to hold steady. ● Peer learning: survey data indicated that learners appreciated and asked for even more peer-to-peer learning. A MS Teams team was established to facilitate peer-to-peer interactions.
7. Collaborate effectively with others, in person and virtually.	Instructional Design	Collaboration throughout the project was primarily virtual, as team members were spread across three different time zones. To ensure effective collaboration, the team developed and followed a project plan that helped ensure alignment with the client's expectations and needs. The project plan facilitated communication, task allocation, and progress tracking, allowing for a smooth and efficient workflow. Additionally, the team provided regular feedback to one another, fostering an open and constructive environment that encouraged continuous improvement. The project team also sought feedback from the client at various stages of the project to ensure that their expectations and needs were being met. This iterative feedback process enabled the project team to make any necessary adjustments to the approach and deliverables, ultimately resulting in a more successful project outcome. By leveraging virtual communication tools and adhering to a well-structured project plan, the team effectively collaborated to achieve the project goals while maintaining consistent engagement with the client.
8. Communicate effectively in written, verbal, and visual forms.	Instructional Design	Throughout the project, the project team communicated using various channels, such as email, virtual meetings, online chat (Google Spaces) and document collaboration platforms. Written communication was clear and concise, while verbal communication in virtual meetings fostered understanding and alignment. Visual communication played a significant role when communicating updates to the client or explaining the models, such as ADDIE, being used. Although communication efforts were generally effective, the project team could have benefited from more frequent check-ins with the client to ensure that each part of the

		project made sense to them in the context of the overall project.
9. Use evidence-based practices.	Both	Evidence-based practices involve using research-based knowledge and data-driven strategies to inform decision-making and guide interventions. The project team employed evidence-based practices by conducting a thorough literature review, gathering data through a needs assessment, and applying established instructional design models, such as Gagné's 9 events of instruction. These practices allowed the team to create instructional and non-instructional materials grounded in empirical evidence and best practices.
10. Contribute to the professional community of practice.	Both	A learning community of practice involves a group of learners in a classroom or educational setting, whereas a professional community of practice consists of colleagues within a workplace, members of a professional association, conference attendees, or journal subscribers. I presented the project methodology and findings to about 50 participants during the company's annual learning professionals conference. In the post-attendance survey, most indicated that they intend to apply some or most of the process presented. Additionally, my team has continued to apply Chyung's 10-Step model regularly when evaluating different projects, thereby contributing to the professional community of practice.

TABLE 2. OPWL TOOLS/PHASES

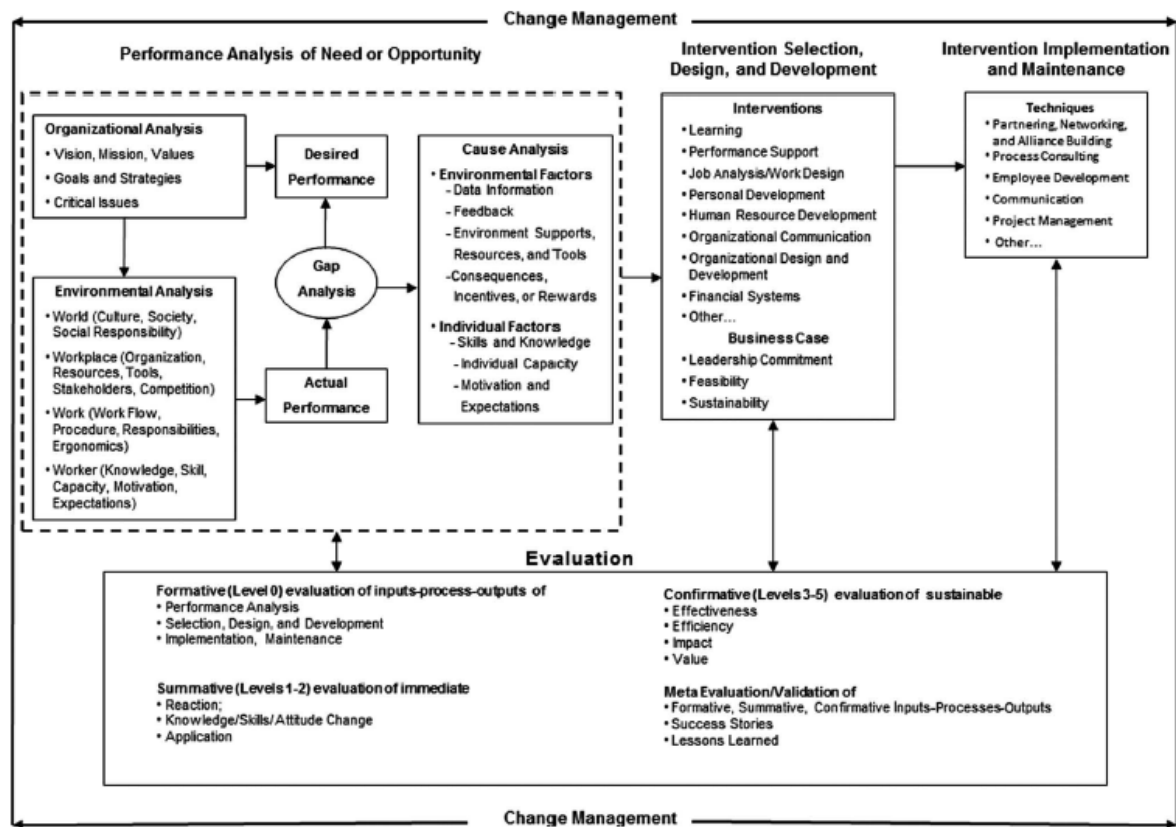
Directions for students: Place an X in the first column in front of each tool that is actually used in your case study(or studies) (do not select tools just because you thought about using them; you should have likely referred to using those tools in your explanations of OPWL learning goals in Table 1). Then for each marked tool, place an X in the column(s) indicating the phase(s) of the Performance Improvement/HPT model (Dessinger, Moseley, & Van Tiem, 2012; also see Figure 1) that tool was applied to. Be prepared to discuss how you used each of the selected tools in your case study (or studies).

	Section 2 – HPT Phase	Performance Analysis of Need or Opportunity	Intervention Selection, Des.& Dev.	Intervention Implementation & Maintenance	Evaluation	Change Management
Section 1 – OPWL Tool						
1. Gilbert's first, second and third leisurely theorems	X					
2. Rummler's and Brache's performance matrix						
3. Langdon's language of work (LOW)						
4. Mager's and Pipe's performance analysis flowchart						
5. Kaufman's organizational elements model (OEM)						
6. Marker's synchronized analysis model (SAM)						
7. Kellogg's program logic model					X	
8. Brinkerhoff's success case method (or only training impact model)						
9. Chyung's 10-step evaluation procedure					X	
10. Kirkpatrick's 4-level model of evaluation					X	
11. American Evaluation Association (AEA)'s guiding principles for evaluators	X	X	X	X	X	
12. ISPI's code of ethics	X	X	X	X	X	
13. ISPI's standards for performance improvement	X	X				
14. Thorndike's Law of Identical Elements						
15. Principles of Reinforcement from radical behaviorism						
16. Cognitive Information Processing Model (computer analogy)						
17. Knowles' Core Adult Learning Principles						
18. Bloom's taxonomy of educational objectives	X					
19. Mager's 3-part method for writing instructional objectives						

20. Keller's ARCS model for motivational design of instruction					
21. Harless' 13 "smart" questions					
22. Procedural analysis, learning hierarchy analysis or other established task analysis method	X				
23. Bronco ID model or another established ID model	X	X	X	X	
24. Merrill's first principles					
25. Gagne's 9 events of instruction		X			
26. Authentic learning assessment					
27. Broad & Newstrom's strategies to promote transfer of learning					
28. Business Logic Model of Silber and Kearny					
29. Marker's Six-P Framework for Evaluation					
30. Five Stage Change/Implementation model (Based on Rogers and Kotter)					
31. SWOT Analysis				X	
32. Force-Field Analysis					
33. Double-Loop Feedback					
34. Cognitive load theory (CLT)					
35. Cognitive theory of multimedia learning principles					
36. Other – Describe an established tool that is not listed in this matrix:					

Figure 1

Performance Improvement/HPT Model.



Source: Dessinger, J. C., Moseley, J. L., & Van Tiem, D. M. (2012). Performance improvement / HPT model: Guiding the progress. *Performance Improvement*, 51(3), 10-17. <https://doi.org/10.1002/pfi.20251>