OPWL Program Learning Goals

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Table 1. OPWL Learning Goals

Five OPWL Learning Goal	Demonstrated in which work sample?	Explanation
1. Apply systematic and/or systemic methods to performance improvement work.	Instructional Design	**Apply systematic methods:** A systematic approach to human performance improvement ensures the application of a structured set of methods and procedures to guide performance analysis, cause analysis, and intervention selection. Applying a systematic method drives efficacious intervention recommendations and/or learning design since it is not based on "gut instincts" but rather on established theories and data. My team and I applied a systematic approach to our instructional design project by adhering to the phases of the **Learning and Performance Support (LeaPS) ID model**, starting with empathy and analysis, moving onto design and development, then recommending an implementation strategy for our client. The LeaPS model alone, however, was just one tool we leveraged to guide the end-to-end process. Within each phase of the model, we applied additional models and tools to collect data and make evidence-based decisions. For instance, by the second phase, design and develop, the scope of the performance problem had finally taken shape and we had completed the hard work of decomposing job tasks into discrete, sequential components via the **task analysis**. Now, it was time to craft learning objectives and dive into lesson design. To do this, we recalled **Bloom's taxonomy** and selected verbs that matched the cognitive domain specified by the client. Then, we crafted learning objectives using **Mager's three-part method**, ensuring each terminal objective contained the performance standard, the conditions for performance, and the criterion for success. Finally, we crafted two lesson plans using **Merrill's first principles** of instruction to drive learner engagement and job transfer. **Apply systemic methods:** The need to apply a systemic approach to performance improvement is equally important. This means the practitioner must deliberately consider the interconnectedness of all organizational systems before committing to an intervention recommendation. Factors like an organization's culture, physical environment, leadership, mission, products/services, industry, tenure, and so forth all impact the feasibility of a given performance improvement strategy. Forgoing a systemic lens risks sweeping adverse impacts. To ensure we applied a systemic lens, we met with the client to perform a **training requirements analysis**, asking a series of

		questions that allowed us to determine why the training was needed. This was followed closely by a **learner and environmental analysis** during which we asked probing questions that provided us with a snapshot of a typical learner and the environment in which they would be learning. In particular, we learned what the learners already know about the topic, what they will need to know to perform their job tasks safely and accurately, and what specific contextual factors will influence their willingness or ability to learn.
2. Apply established professional ethics and standards to performance improvement work.	Instructional Design	**Apply professional ethics:** As an HPI practitioner, it is my responsibility to adhere to established professional ethics and standards, including those outlined in the **American Evaluation Association (AEA)**, the **Academy of Human Resources Development (AHRD)**, and the **International Society of Performance Improvement (ISPI) code of ethics**. Within instructional design, we adhered to these standards by ensuring our work was guided by systemic inquiry, integrity, transparency, confidentiality, and respect. We adopted valid, data-based practices into our analysis and design, such as incorporating **Keller's ARCS-V theory of motivational design** into our deliverables. We protected the client against privacy violations and confidentiality breaches by signing a non-disclosure agreement, reviewing redacted extant documents, and employing pseudonyms. **Apply professional standards:** We also adhered to professional performance improvement standards, keeping **ISPI's 10 Performance Improvement standards** front of mind throughout our instructional design project. For instance, by **taking a systemic view** (Standard # 2) of the performance problem, we were able to design a sustainable, future-proofed learning experience that could be implemented immediately. We **added value** (Standard # 3) by demonstrating to the client how a curriculum deficit was impacting learners' ability to execute a key skill–delivering a CU brief–and that the inclusion of a dedicated lesson plan into the existing curriculum could help bridge the gap. Our client understood the positive implications of our learning solution and was eager to bring it back to his team. We also **worked in partnership with the client** (Standard # 4), meeting weekly to help the client understand our production process, listen to him describe the performance problem, collaborate on a viable solution, and craft a final product we were all proud of.
3. Align performance improvement solutions with strategic organizational goals and make recommendations to produce results valued by organizations.	Change Management	**Align with strategic organizational goals:** The goal of the change management initiative was to migrate all training from disparate sources and stakeholders to a centralized Learning Management System owned and operated by the Learning & Development team. This effort would have a direct impact on the organization's long-term health by mitigating compliance violations; avoiding fines, lawsuits, worker's compensation claims, and factory shut-down; decreasing safety incident rates caused by critical knowledge and skill gaps; and reducing subsequent attrition rates. A

		successful management of change would provide the foundation needed to achieve its primary mission: driving sales. **Make recommendations that produce valued results:** To successfully manage this transition, I needed to "unfreeze" the organization and awaken them to the severity of the organization's safety and compliance vulnerabilities. After completing a gap and cause analysis, I recommended a three-pronged response: (1) plug the hole, (2) bail the water out of the ship, and (3) repair the hole with hammer and nails. In phase one, we needed an accurate tally of which employees had completed what state- and federally-mandated training and which had not. I performed an enterprise-wide audit, mapping roles to training requirements, then determined who in each role had completed what training. This work yielded a 29% training completion deficit. In phase two, we urgently needed to close this gap. I partnered with the EHS team to schedule a month-long safety training blitz, running 30+ sessions and 12 unique courses across three shift schedules to close the gap among our 300-person workforce. Concurrently, I created two new standards: (1) a New Hire Onboarding SOP to ensure all new hires were enrolled in and completed all safety and compliance courses within their first week on the job, communicating with their managers the criticality of this protected time; and (2) an escalation pathway to hold employees and their managers accountable for overdue training. Finally, I needed to keep our leadership team engaged and informed, so attended weekly safety leadership meetings to report out and hold managers accountable. With the work of unfreezing the organization done, I was ready to embark on phase three: moving the organization to a new status quo through the adoption of a new Learning Management System. This work in sum helped save the company $1.13m by avoiding regulatory violation fines, factory shutdown, worker's compensation claims, and productivity loss.
4. Collaborate effectively with others, in person and virtually, and communicate effectively in written, oral, and visual forms.	Instructional Design	**Collaborate effectively:** The four members of the instructional design team collaborated effectively throughout the 15-week course. We crafted a team charter to specify roles and equitably tackle coursework tasks according to preference and individual strengths: project manager, communications manager, customer relationship manager, and instructional designer. We all agreed to take on the last role, helping one another with drafts and offering timely advice and feedback. We met once per week via Zoom and communicated any absence or late-joins via Google Chat. Our project manager sent an agenda ahead of each session to ensure the team was prepared to discuss time-sensitive issues and items and escalate concerns. Sessions were recorded and notes complete with action items drafted in a central location. We leveraged a shared Google Drive to house and maintain

		all work products, agreeing to adhere to a file structure that made retrieving and editing deliverables seamless. We also created a shared Google calendar for the team that was regularly maintained by our communications manager. The labor was divided fairly, ensuring no one team member became overburdened or overwhelmed. **Communicate effectively:** Internal communication was frequent and timely, allowing us to keep one another informed and stay on track. Communication with our client was funneled through our customer relationship manager to mitigate confusion and make sure he was clear about how to reach his primary point of contact. The customer relationship manager owned external communications but made sure the rest of the team was always cced so that everyone had the most current information to move forward at any given time. We held weekly 60-minute calls with our client at the same time and date, furnished with an agenda. All project team members who could attend did so, but we recorded each session and placed those recordings into the Shared Drive so all could participate despite potential meeting conflicts. All members of the team were clear about their weekly responsibilities which were articulated on a project tracker developed and maintained by the project manager. The project manager would send reminders and follow-ups as needed to ensure deliverables remained on track and any blockers removed, as applicable. Our client expressed how impressed he was with the process and appreciated how much he learned about both his program and human performance improvement as a whole. He shared that the products that we supplied would be used as a springboard for further program overhaul.
5. Apply theory and evidence to performance improvement work.	Change Management	**Apply theory to practice:** My approach to change management applied established, scientifically-derived HPI theory and empirical evidence to achieve results. I used **Lewin's three-step change model** to usher the organization through new system adoption. During the "unfreeze" phase, I analyzed the root cause of the performance problem by plotting the elements of **Chevalier's Updated BEM** onto an **Ishikawa diagram**. This allowed me to systematically determine factors contributing to the performance deficit, ascertain a three-dimensional snapshot of the current state, and recognize the areas in which intervention was needed to achieve the desired future state. Additionally, this stage served as a key tool to help articulate the criticality of the performance problem, its impact on the business, and why stakeholders should invest resources in fixing the problem. **Apply evidence/data:** To ensure my recommendations were data-driven, I worked to **triangulate** multiple data sources through ● digital and paper training records review;

		● current standard operating procedures (SOPs) review; ● semi-structured interviews with the Director of EHS, training coordinator, instructors, VP of People, select Operations leaders, and COO; ● a synchronous Root Cause Corrective Action working session with key stakeholders; ● training observations; and ● auditing other digital artifacts (e.g., event invites, third-party vendor records, confirmation emails). I also administered an organizational culture assessment using **Cameron & Quinn's (2011) Organizational Culture Assessment Instrument (OCAI)** to better understand how change could best be managed given its particular culture profile. For instance, as a start-up eager to establish a positive reputation in the industry, the organization's strong market-driven culture meant leapfrogging from one "fire" to the next. To plan around this, I needed to develop a strategy that kept leaders focused on the immediate, costly risks and how this solution–though labor-intensive–would pay dividends downstream once implemented.

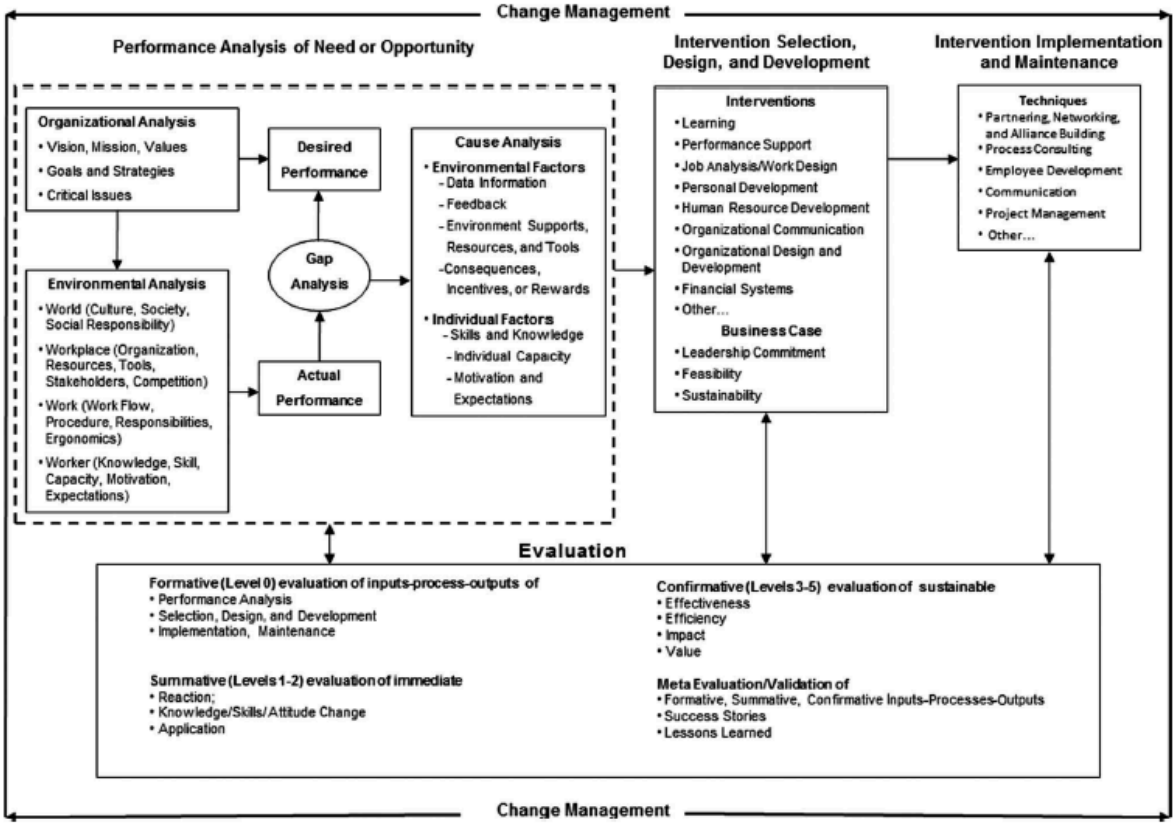
TABLE 2. OPWL TOOLS/PHASES

	Section 2 – HPT Phase Section 1 – OPWL Tool	Performance Analysis of Need or Opportunity	Intervention Selection, Des.& Dev.	Intervention Implementation & Maintenance	Evaluation	Change Management
	1. Gilbert's first, second and third leisurely theorems					
	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					
	8. Brinkerhoff's success case method (or only training impact model)					
	9. Chyung's 10-step evaluation procedure					
	10. Kirkpatrick's 4-level model of evaluation					
	11. American Evaluation Association (AEA)'s guiding principles for evaluators					
	12. ISPI's code of ethics					
	13. ISPI's standards for performance improvement					
	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					
X	18. Bloom's taxonomy of educational objectives		ID			
X	19. Mager's 3-part method for writing instructional objectives		ID			
X	20. Keller's ARCS model for motivational design of instruction		ID	CM		
	21. Harless' 13 "smart" questions					
X	22. Procedural analysis, learning hierarchy analysis or other established task analysis method	ID				
	23. Bronco ID model or another established ID model					
	24. Merrill's first principles					
	25. Gagne's 9 events of instruction					

	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					
	32. Force-Field Analysis					
	33. Double-Loop Feedback					
	34. Cognitive load theory (CLT)					
	35. Cognitive theory of multimedia learning principles					
X	36. Chevalier's Updated Behavioral Engineering Model	CM				
X	37. Boise State University LeaPS model	ID	ID			
	40. Chevalier's Cause Analysis Worksheet					
X	41. Lewin's 3-step change theory					CM
X	42. Training Requirements Analysis	ID				
X	43. Learner and Environmental Analysis	ID	ID			
X	44. Ishikawa's fishbone diagram	CM				

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