

Design Document

EDUC 765: Trends and Issues in Instructional Design

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Submitted

Project Proposal – Module 2

Project Title

Leadership Skills for Future Leaders

Sponsoring Organization

Commercial Bank, the Quantitative Research Department, 500+ employees worldwide

Project Description / Problem identification

The top and mid-level managers in the Quantitative Research Department expressed the need for training based on their previous and current experience. They believe that the bank's expectations for future managers are not clear and well-articulated.

Aim

The aim of this proposal is to understand the many characteristics of leadership: motivation, emotional intelligence, communication, leadership style, coaching, mentoring, and assessment. The training is intended to set up a mentoring process that will cover all of those leadership traits and help participants chart a path to success.

Target Audience

The target audience is potential future leaders.

Delivery Options

Commercial Bank is a global company with offices worldwide. In response to that geographic spread, the leadership training will be entirely online.

Front-End Analysis: Instructional Need – Module 3

Instructional Need

Bank management concluded that leadership development is crucial and decided to offer training to improve those skills. The human resources (HR) department will be responsible for the training. The company is in a new phase of development, in which change is promoted at different levels; leadership development is one of them. There are defined performance problems and needs: the expectations for future leaders are not clear, and there is insufficient support at the individual and organizational levels. The focus is on the opportunity for potential leaders to expand and fulfill the requirements as leaders.

Needs Assessment

The first step in the program will be to conduct a needs assessment to identify existing performance issues. Rossett (1999) identifies four opportunities for identifying performance problems. In this case, the company recognized a need to “develop its people so they can continue to contribute to the growth of the company.” (Morrison et al., 2013) The managers believe there is a lack of skill and knowledge at the company’s organizational and individual levels.

The instructional challenge is the lack of leadership skills, socialization, and support for company managers. Middle and top managers claim that there is no established professional development policy, strategy, or leadership practice at the organizational level. They also feel that the HR department should be responsible for leadership development and should be the office that develops and oversees the training. HR agrees that middle and top managers’ expectations and responsibilities are not clear, which sometimes leads to miscommunication and a lack of constructive feedback for leaders at the individual level. For our study, this represents an anticipated or a future need because it focuses on a performance problem, and seeks to fulfill the related requirements.

The needs assessment will be used to identify the performance problem and also design a program of intervention (in this case, online training). There are four phases of needs assessment: (1) planning, (2) collecting data, (3) analysis, and (4) preparing the final report. Data sources include company documents, interviews, surveys, and on-site analysis.

- 1-2. planning and collecting the data

One of our primary goals is to identify the stakeholders, get 100% support for the project, and discuss every challenge the program might face. The broader audience will include top and middle managers and HR department professionals. The HR department and the top managers will act as subject matter experts (SME).

Audience and method of data collection:

- A. one-on-one semi-structured and focus group interviews:
 - HR department employees (one-on-one)
 - top managers, members of the board (one-on-one); identify the stakeholders
 - middle managers, and candidates for promotion (one-on-one and focus group)
 - a focus group of selected employees (focus groups and survey)

- B. document and content analysis:
 - design a feedback system
 - assemble relevant documents about learning
 - managing talent development
 - practicing organizational coaching, mentoring
 - leadership skills

Most of the one-on-one interviews will take place online. A follow-up interview will sometimes be requested to review and confirm the information. If possible, focus group interviews will be conducted on-site.

All documents related to organizational learning and support will be requested. A lack of irrelevant documents could risk the outcome of the assessment. In this case, documents should be produced during the process.

3-4. analyzing the data and the final report

The interviews will be analyzed using qualitative content analysis. Survey data will be analyzed using a quantitative method. To prioritize needs, the Delphi method will be used. A summary of the findings will be produced, including relevant recommendations.

Goals Analysis

Based on the results of the needs assessment, we will conduct a goal analysis. During the goals analysis, we will establish goals that represent a diverse point of view and address as many fields as possible.

The goals analysis begins with input on the nature of the problem; in this case, it will be the managers' feedback about promotion, leadership development, and support. We will assemble a group of about 10 people, representing different levels, fields, and needs of the company. The

group will include at least one top manager, middle managers, future managers, and HR professionals. The steps in the analysis are described below.

Identify the overall aim: Support leadership development at the company.

Set Goals

- know the leadership styles
- choose their leadership style
- know their personality
- define their leadership style
- reflect on their leadership style
- create their leadership styles
- learn more about possible leadership development
- learn about collaborative learning
- learn about knowledge sharing
- learn about mentoring and reverse mentoring
- learn about emotional intelligence
- learn about coaching
- learn about organizational support
- learn about organizational documents
- learn about diversity in leadership development
- create small collaborative learning groups
- support each other in collaborative learning
- practice self-coaching techniques
- create small mentoring groups
- practice reverse mentoring
- learn about possible ways to give and receive feedback

Preliminary Refinement of Goals

- learn leadership styles
- know about their personality
- define their leadership style
- reflect upon their leadership style
- create their leadership style
- learn more about leadership development research
- learn about collaborative learning
- learn about knowledge sharing
- practice knowledge sharing
- learn about mentoring and reverse mentoring
- learn about emotional intelligence
- learn about coaching

- gain experience with coaching
- learn about possible organizational support methods
- reflect upon possible organizational support methods
- learn about diversity in leadership development
- create small collaborative learning groups
- plan the first six months of the small collaborative learning groups
- learn about communities of practice
- learn about knowledge management
- support each other in collaborative learning
- gain experience in peer mentoring
- learn about possible ways to give and receive feedback

Preliminary Ranking of Goals

- a. learn about their personality
- b. learn leadership styles
- c. define their leadership style
- d. reflect upon their leadership style
- e. create their leadership styles

- f. learn more about possible leadership development research

- g. learn about collaborative learning
- h. learn about knowledge sharing
- i. practice knowledge sharing

- j. learn about mentoring and reverse mentoring
- k. learn about emotional intelligence
- l. learn about coaching
- m. gain experience with coaching
- n. gain experience in peer mentoring

- o. learn about possible organizational support methods
- p. reflect on possible organizational support methods

- q. learn about diversity in leadership development

- r. create small collaborative learning groups
- s. plan the first six months of the small collaborative learning groups
- t. learn about communities of practice
- u. learn about knowledge management
- v. support each other in collaborative learning

- w. learn about possible ways to give and receive feedback

Final Refinement of Goals

1. Define learner's personality, leadership styles, collaborative learning techniques, mentoring techniques, coaching techniques, and methods of sharing knowledge.
2. Analyze diversity in leadership development.
3. Demonstrate collaborative learning, knowledge sharing, peer mentoring, and leadership development.
4. Develop a personalized plan for leadership development, including different techniques. (mentoring, coaching, and collaborative learning)

Final Ranking of Goals

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Conduct a full learner and context analysis

The target audience is the employees of the Quantitative Research Unit. The first cohort will include potential future top and middle-level leaders worldwide (selection based on feedback provided by management).

The following categories of learner characteristics will be utilized: (1) general characteristics, (2) specific entry characteristics, (3) learning styles, (4) academic information, (5) personal and social characteristics, (6) culturally diverse learners, (7) learners with disabilities, and (8) adult learners.

The survey will include all employees of the Quantitative Research department.

1. General group characteristics include:
 - a. gender: 75% male, 25% female
 - b. education: 60% PhD, 40% MA
 - c. age: 15% 20-30 yrs., 55% 31-40 yrs., 15% 41-50 yrs., and 15% 51-70 yrs.
2. Specific entry qualifications include computer skills mastery at 100%.
3. Learning styles mean how individuals approach learning tasks and process information. Adult learners prefer visuals and audio and learning in smaller segments.
4. Personal and social characteristics of adult learners include more precise expectations of leaders, internal motivation.
5. The group is culturally diverse, including learners from all over the world.

Environmental characteristics

Learners will do the training during business hours, in their home office, or at the workplace. Each participant has access to a good quality computer. The difference in time zones will be considered when planning simultaneous exercises.

Front-End Analysis: Learner Characteristics – Module 3

Learner Analysis

Primary Audience

- potential leaders
- current middle and top managers

Secondary Audience

- employees of other departments
- board members and CEO

General Learner Characteristics

1. General characteristics: gender - 75% male, 25% female, education - 60% PhD, 40% MA; age - 15%: 20-30 yrs., 55%: 31-40 yrs., 15%: 41-50 yrs., and 15%: 51-70 yrs.)
2. Specific entry characteristics: computer skills mastery level 100%
3. Learning styles: how individuals approach learning tasks and process information: Learners prefer visuals and audio and like to learn in smaller chunks.
4. Personal and social characteristics: expectations: clearer expectations towards leaders, most of them internally motivated, previous experience: 55%
5. Culturally diverse learners: learners from all over the world

Entry Characteristics

- computer skills
- collaborative learning

The target of instruction is a culturally diverse, global audience. Therefore, the training will be inclusive, representing the group's diversity. One expressed goal is to make all voices heard. This openness will be supported by peer-review exercises and discussions, in which anyone can propose a challenge or a topic of concern.

Contextual Analysis

Orienting Context

- Learners take this training because it will represent their expressed needs and expectations.
- Learners see the training as providing information and helping develop skills.
- Communities of practice will be built and supported based on the training. The mentoring system will function and later be implemented as a relevant part of the feedback and promotion system.
- A potential misconception is that this is just another training.

Instructional Context

This training will be entirely online because employees are located worldwide, in many time zones.

Technology Inventory

Because the training is for the Quantitative Research Unit of the bank, everyone is skilled at using and learning new technology.

Transfer Context

- Knowledge and skills will be applied continuously.
- Learners will use new knowledge and skills in their everyday life.
- Based on the findings and the training experiences, a mentoring system will be launched in the department. The HR department will create collaborative learning opportunities, and communities of practice will be supported. Coaching will be available.

Instructional Impact Based Upon Learner Characteristics – Module 4

Application of Learning Theories

The target audience is adult learners. Therefore, it is vital that we rely on adult learning theories (instead of pedagogical ones). There are specific points that we must consider when designing programs or courses for adults.

Our program (including goals, objectives, assignments, and assessment) and our communication must be transparent. We must be open and encourage feedback, not just at the end of the course but also during the course. If needed, instructors should make appropriate changes to course structure. Adult learners usually act as responsible and knowledgeable learners; the entire instructional approach should be focused on those traits.

The following learning theories will be applied.

Adults have previous experiences that can affect the learning and teaching process. The expertise they bring offers excellent added value to the learning process. As Knowles stated, there are four principles for teaching adult learners. Experience is one of them. Adults also prefer problem-centered instruction. They are involved in learning, and it is essential that learning and instruction have relevance and impact in their lives. According to Knowles, adults are internally motivated, problem-oriented, ready to learn, and self-directed. (Knowles, 1984)

Gagné's nine levels of instruction are useful when considering the whole learning process. Those levels include gaining attention, informing learners of objectives, prior learning, presenting content, providing guidance, practicing, providing feedback, assessing performance, enhancing retention, and transferring to the job. Particularly useful is the first level of gaining attention, which we concede can sometimes be challenging. (Gagné, 1985)

Sweller's Cognitive Load Theory is about how learners' short- and long-term memory relates to instruction. According to the theory, instructional design can reduce the load on working memory with limited capacity, promoting the transfer of knowledge to long-term memory. (Sweller, 1988)

Kolb categorized how adult learners learn and what learning styles they can develop in his Learning Styles and Experiential Learning Cycle model. He states that experiential learning is cyclical, occurring in four stages:

- relevant experience
- reflective observation
- abstract conceptualization

- active experimentation (Kolb, 1984)

Also applied in the study will be the Kirkpatrick Four-Level Training Evaluation Model, which focuses on the impact of instruction. The four levels of the Kirkpatrick Model are listed below:

- Reaction – how did learners react to training?
- Learning – did they understand the training?
- Behavioral change – did they utilize what they have learned?
- Organizational performance – did the material have a positive impact on the organization? (Kirkpatrick, 1994, 1996)

Application of Motivational Theories

One of the most important characteristics of adult learners is that they want to learn, know the purpose of learning, and understand how they will benefit. They typically learn because they are internally motivated. However, they can also be responsive to external factors, such as a promotion or career change.

Self Determination Theory states that “individuals have a basic drive toward growth as humans and that the needs for autonomy, relatedness, and competence are at the core of this drive.” (Houde, 2006) It means that there is an inherent need or drive to grow, which can take the form of learning. This drive can influence the design materials for adult learners. It is essential to create and present materials adults find interesting enough that they continue their learning process.

The Impact of Diverse Audiences on Instruction

The target audience:

- is culturally diverse
- embraces a variety of positions
- reflects different interests in learning
- is willing to take on a variety of responsibilities

Our study will use examples that reflect the cultural diversity of the company. Because diversity and equity are two critical strategic factors, they should not be neglected during the design process. Different points of view expressed by people from different backgrounds and positions will be collected during the Needs Assessment.

Instructional Goal, Task Analysis & Course Map – Module 4

Instructional Goals

1. Define learner's personality, leadership styles, collaborative learning techniques, mentoring techniques, coaching techniques, and methods of sharing knowledge.
2. Analyze diversity in leadership development.
3. Demonstrate collaborative learning, knowledge sharing, peer mentoring, and leadership development.
4. Develop their personalized plan and techniques for leadership development. (mentoring, coaching, and collaborative learning).

Task Analysis Method

A Topic Analysis will be conducted in the first phase of the design project. However, a Critical Incident Analysis is also planned for Goals 3 and 4. The Topic Analysis will define facts, concepts, principles, and rules. It defines the content structure of the analysis.

Goal 1: Define learner's personality, leadership styles, collaborative learning techniques, mentoring techniques, coaching techniques, methods of knowledge sharing.

Topic Analysis

The challenges are addressed in the following topics:

- personality test
- leadership styles
- collaborative learning techniques
- mentoring techniques
- coaching techniques
- knowledge sharing methods

Topic 1: personality test

- different personality tests
- use personality tests for leadership development

Topic 2: leadership styles

- defining leadership
- leadership styles – different approaches
- leadership development

Topic 3: collaborative learning techniques

- learning styles and techniques
- collaboration in learning
- the importance of collaborative learning
- collaborative learning methods
- organizational support for collaborative learning
- collaborative learning for leadership

Topic 4: mentoring techniques

- the importance of mentoring
- different types of mentoring
- peer and group mentoring
- reverse mentoring
- mentoring systems
- organizational support for mentoring
- mentoring for leadership

Topic 5: coaching techniques

- the importance of coaching
- different types of coaching
- individual and group coaching

- self-coaching techniques
- organizational support for coaching
- coaching for leadership

Topic 6: knowledge sharing methods

- defining knowledge
- the importance of knowledge sharing
- methods of knowledge sharing
- organizational support for knowledge sharing
- knowledge sharing for leadership development

CONCEPTS - examples


- knowledge
- coaching
- mentoring
- collaborative learning
- leadership

PROCEDURE - example

The company has multiple ways to support leadership development.

PRINCIPLE – example

Organizational support is essential for successful leadership development.



Instructional Objectives – Module 5

Instructional Objectives

Topic: Coaching

Instructional objective 1.

Describe 3 different approaches to coaching in the context of leadership development.

Domain: cognitive

Category: remembering

Performance: recognize

Condition: leadership development

Criterion: 3 approaches

Instructional Objective 2.

Identify 5 examples why and how coaching can be a useful tool for own personal growth in the organization.

Domain: cognitive

Category: understanding

Performance: give an example

Condition: coaching

Criterion: 5 examples

Instructional Objective 3.

Describe at least 3 modes how coaching will support their own leadership development.

Domain: cognitive

Category: evaluating

Performance: describe

Condition: their own leadership development

Criterion: 3 modes

Instructional Objective 4.

Together with HR and managers create a personal plan for the next 6 months including at least 3 techniques and methods intended to use for leadership development.

Domain: cognitive

Category: creating

Performance: create

Condition: together with HR and managers

Criterion: personal plan including 3 techniques

Instructional Objectives Matrix & Supporting Content – Module 6

[For each of your Instructional Objectives from the previous module, provide the Pre-Instructional Strategy, Initial Presentation, Generative Strategy/Activity, and Test Item/Assessment.]

Topic / Step

[Replace this with the topic or Step you used in the previous module]

Pre-Instructional Strategy

[Replace This Text with the Pre-instructional Strategy]

Objective 1

[Replace this with one of the objectives you created for the previous module]

Initial Presentation

[Replace This Text with information about your initial presentation around this objective.]

Generative Strategy / Activity

[Replace This Text with the Generative Strategy / Activity learners will participate in specific to this objective.]

Test Item / Assessment

[Replace This Text with the Test Item / Assessment that will be used to determine the learner's mastery of the objective.]

References

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