

Monterey Bay Aquarium Needs Assessment

Amanda Philbrick

Instructional Science and Technology, California State University, Monterey Bay

IST522: Instructional Design

Dr Sheryl Hathaway & Dr. Gary Rauchfuss

September 19, 2022

Brief Introductory Info

Your Name	Amanda (Mandy) Philbrick
Your IDD Topic	Financial Stewardship/Fiscal Awareness
Organization	Monterey Bay Aquarium (MBA)
Learners	MBA Management Team

An Introductory Note

Monterey Bay Aquarium's (MBA) mission to inspire conservation of the ocean environment is one that resonates with me. As a frequent visitor over the years, and a recent transplant to the Monterey Bay area, I aspire to support their important work. In the recent MBA Shorelines magazine, I was impressed to learn of the efforts vice president of education Dr. Jenny de la Hoz and her team have made to flexibly adapt to serving students and teachers during the pandemic. I was interested to learn that the education team plans to create at least two new online courses each year (Cooper et al., 2022). In years past, I have admired the in-person community education presented by MBA, and more recently, I have explored and appreciated their free online education modules. My keen interest in furthering MBA's conservationist mission, and their clear dedication to community education, drew me to their organization. I would be honored to devote my assessment efforts this semester, and my master's in Instructional Science and Design (MIST) capstone work, to identifying a gap that would benefit from an instructional design product.

Data Collection**First Source (Internet Search, Call to Education Department)**

I began by visiting the Monterey Bay Aquarium's website with the aim to analyze current resources and note any obvious needs. I was impressed to note that several educational programs are freely available to educators and families. I did see that the teen Bechtel Education Center programs are currently on-hold, and that multiple of the current job openings are for education department staff positions (Monterey Bay Aquarium, 2022a, 2022b).

After identifying contact information on their website, I called and left a voicemail message for the MBA education team expressing my strong interest in devoting my MIST capstone efforts to furthering their mission. As the contact was a general one, and the voicemail recording warned to anticipate delays, I was not hopeful of a swift, if any, response.

Second Source (MBA Education Department Employee)

I then reached out to the MIST Student Services Coordinator, Ryan Eller, and expressed my interest in collaboration with the Aquarium, inquiring if there are established contact personnel I might contact.

Ryan responded promptly, indicating that, not only have MIST students previously collaborated with the Aquarium (including two currently in their final semester), but there are two graduates of the MIST program who now work in the MBA education department. Ryan offered to reach out to these former students currently employed by MBA to see if either were open to informally discussing my capstone project. I responded to Ryan with an enthusiastic affirmative.

Former MIST student and current MBA employee, Brianne Fitzgerald, responded to Ryan Eller's inquiry, indicating that MBA collaboration is a possibility. She advised that potential projects include building on the capstone project of two current MIST students,

expanding on a course the MIST summer 626 cohort began, or beginning a new project that would benefit the Aquarium.

Third Source (Current MIST Students' Capstone Presentation)

My concrete efforts thus far have been to secure a client. As Rothwell et al. (2016) state, it is important to first identify the client and intended learners, directing subsequent assessment. While I am not yet certain where my efforts will be focused, and am awaiting identification of an MBA collaborator, I was fortunate to attend Mona Antonious and Yerlany Mendez's capstone project presentation the first weekend of the semester, providing possible direction and initial needs assessment data. I learned that they are creating a Financial Stewardship Series, with management as the target audience. Their aim is to address lack of familiarity with both the language of finance and with the spending practices of the Aquarium. The goal is for the Aquarium to maintain financial stability.

Fourth Source (Anticipated Contacts for Interviews)

Brianne and I have emailed back and forth multiple times over the past week. Most recently, she notified me that, "I am waiting to hear back from our education team. If they cannot [support], Dr. Sarena Randall Gill has just joined our Learning and Engagement team and I gave her the background on this program [and] the Capstone projects, and she is interested in connecting with you." I have expressed my gratitude and am awaiting updates from Brianne.

Additionally, I followed up with Ryan Eller, who expressed encouragement, noting that the presence of a former MIST student at MBA, and current MIST student contacts, will be an asset in completion of upcoming assessments. Ryan offered to reach out to Dr. Farrington to clarify the content and purpose of the recent 626 project. I expressed my appreciation and am awaiting an update from Ryan on Dr. Farrington's information.

Additionally, I am awaiting confirmation if it might be appropriate for me to independently reach out directly to current MIST capstone students Mona and Yerlany, or if this ought to be facilitated by university staff. I hope that interviewing these current collaborators will provide meaningful needs assessment information to guide future efforts.

Problem or Opportunity

Here's Where We'd Like to Be

The driving organizational goal is maintenance of fiscal stability. It is essential that decision-makers in management positions possess a firm grasp of basic financial concepts, and that they remain cognizant of the intricate fiscal decisions made across all departments. In an open systems paradigm, it is important to recognize the many internal and external factors that impact organizational success, including interdepartmental communication (Rothwell et al., 2016). If building upon Mona and Yerlany's capstone project, my goal will be to facilitate maintenance of management's understanding of fiscal concepts, while also ensuring that team members with financial decision-making power understand the importance of cross-department financial communication and possess a firm grasp of the tools and techniques they should utilize for communication.

Here's Where We Are Instead

The pandemic resulted in significant upheaval for the Monterey Bay Aquarium. Efforts to fight for MBA's sustainability are ongoing. As Brianne Fitzgerald wrote to me, "The entire Aquarium is rebuilding both staff and programs after our shutdown during the pandemic." With high staff turnover and systematic restructuring, one must assume that this client will face significant challenges when it comes to maintaining stable staff understanding and cohesion

between departments. As I continue my collaborative efforts with the client and gain greater access, I hope to thoroughly assess these assumptions, and work from a sound data base.

This Is the Gap We'd Like to Fill (The Difference Between What Should Be and What Is)

My understanding of the gap is that management lacks familiarity with basic fiscal concepts, and that there are not consistent financial communications between departments. Our goals will be to:

- (1) Enhance and solidify management's understanding of basic financial concepts. As advised by Rothwell et al. (2016), it will be important to establish what prerequisite skills are needed, and to assess the current understanding of the target audience. Given that my work will continue that of another's, it will be important to assess and integrate the current experience level of the learners (Stolovitch & Keeps, 2011).
- (2) Facilitate management's understanding of the necessity of consistent communication between departments, work to identify an ideal system of communication, and teach management team members how to implement this system. The goal is for management to make well-informed, cross-departmental financial decisions.

Cause(s) of the Gap

Lack of Knowledge, Skills, and/or Attitudes

As relayed by MBA employee Brianne Fitzgerald, the Aquarium staff are currently presented with massive restructuring of both teams and programs. New employees are faced with the task of acquiring basic skills and knowledge. Established team members are confronted with the additional labor of training new employees, in addition to the work associated with their given professions. Established and novice team members alike may be overwhelmed and are presented with the daily challenge of identifying what efforts are critical. Granting attention to

yet another time-consuming training to facilitate acquisition of lacking knowledge and skills might, understandably, be met with contrary attitudes. It will be important to keep efforts learner-centered, striving to communicate the direct personal value this instruction will provide them (Stolovitch & Keeps, 2011). Brianne did express to me that leadership team members are open to collaborating on master's student capstone efforts, a promising piece of data in terms of positive employee attitudes. Assessment, which will hopefully include in-person observation and interviews, will assist in confirming assumptions.

Lack of Motivation

At this time, I may only conjecture as to motivation levels. Lack of motivation could pose significant challenges. If learners are unable to draw a direct line from instruction to their personal goals, maintaining attention will be an uphill battle. One might hope that motivation to work towards financial stability is high, but assumptions should never be made, and communication of the relevance and value of instruction should be clear (Rothwell et al., 2016). Further analysis of individuals will need to be completed to determine the degree of motivation held by stakeholders.

Issue(s) in the Organization or Environment

As Brianne Fitzgerald communicated, massive restructuring of both staffing and programs are ongoing in the Monterey Bay Aquarium. Systematic changes may lead to redesign of education and restructuring of communication between teams. I imagine that Mona and Yersiny's current project will continue to undergo multiple formative assessments as new employees and programs that may benefit from instruction are identified. Targeted group assessment should take place each time the instruction is delivered (Rothwell et al., 2016). Completion of further assessment to determine the current and anticipated organizational

structure will be necessary. Evaluation of available resources (support personnel, physical building structure, available hardware, time constraints, etc.) and current workflow for the targeted audience will need to take place. Additionally, assessment of current instructional programs will be necessary.

Initial Solution(s)

Learning Solution

With limited knowledge at this time, and pending communication with key stakeholders, I can only speculate what the gaps are and what possible learning solutions for those gaps might be. However, I will hazard to guess that continued efforts to create targeted financial education for team members will be necessary. As implementation of the current product is assessed, areas for improvement may come to the forefront. It will be important to evaluate real-life outcomes of training, and to receive feedback from the learners themselves.

I assume that consistent communication across departments under construction may not yet be established. Instruction on the value of early and clear communication, appropriate tactics for communicating, and how to best implement the tools in place, might be needed for multiple team members. It is possible that a module directly addressing communication might benefit the management team's fiscal stability efforts.

Other Possible Solutions

Given MBA's active restructuring, it will likely be necessary to identify key stakeholders willing to manage fiscal responsibilities for each team. The determination of whom to delegate tasks to, and what communication matrices to utilize, may require development.

It may be worthwhile to ensure non-management team members are aware of the basic concepts presented in this training as well. Some details may be irrelevant, but a general

awareness of and respect for limited financial resources would hopefully lead to an organization-wide sense of responsibility. Assessing this need may lead to creation of an instructional module targeted to a general MBA staff audience.

Organizational and Learner Goals

Main Organizational Goal(s)

The organizational goals are maintenance of fiscal sustainability and conservation of financial resources. These goals can be met with the support of a knowledgeable and cohesive management team, representative of all departments.

Main Learner Goal(s)

All members of the management team will be able to converse knowledgeably about financial concepts and be capable of applying these concepts creatively in real-world scenarios. Managers of all departments will understand the value of, and actively implement, communication tools with the goal of interdepartmental informed decision-making.

Summary

The Monterey Bay Aquarium management team is currently set to receive an hour-long training module under development by MIST students Mona Antonious and Yerlany Mendez. Current MBA employee Brianne Fitzgerald notified me that one of the possible projects I could pursue is building on this work. Given Brianne's assertion that continued efforts are desired, and my lack of knowledge as to other possible needs as I await further feedback, I chose to focus my needs assessment on expansion of the Financial Stewardship project. Possible challenges to this undertaking include lack of skills, knowledge, and motivation for both new and established staff in the setting of staff turnover and systematic restructuring. It is possible that the organizational environment may be chaotic at times, potentially leading to low motivation among staff to

devote precious time to more training. However, continuing to evaluate and facilitate both financial understanding and communication, will serve both the organization and the individuals who continue to undergo training. While I work to establish relationships with key team members and potential collaborators, this needs assessment will require a great deal more work, verifying or disproving assumptions made and adjusting instructional design plans accordingly.

References

- Cooper, H., Bauman, A., Thomas, V., Molle, K., Wolfrum, A., & Mapp, A. (2022). Meet Education VP Dr. Jenny de la Hoz. *Shorelines*, 38 (2), 8.
- Monterey Bay Aquarium. (2022a). *Bechtel Family Center for Ocean Education & Leadership*.
<https://www.montereybayaquarium.org/for-educators/bechtel-education-center>
- Monterey Bay Aquarium. (2022b). *My Job Search*.
<https://recruiting2.ultipro.com/MON1023MBAF/JobBoard/84cdbbe5-6ebd-4432-86f2-05e6fcf67a82/?q=&o=postedDateDesc>
- Rothwell, W.J., Benschoter, B., King, M., & King, S.B. (2016). *Mastering the Instructional Design Process: A Systematic Approach* (5th ed). Pfeiffer.
- Stolovitch, H.D. & Keeps, E.J. (2011). *Telling Ain't Training* (2nd ed). Association for Talent Development.