Section 1: Introduction

* Case studies are written summaries or syntheses of real-life or typical-life situations. These situations or “cases” inform you of data critical to understanding the problem posed. Case studies require you to isolate and think through the key issues and/or interrelationships of the case to gain a better understanding of the situation or process at hand.

**Section 2: The Case**

* **Directions:** Read through the following case study. At the end of the case there is a ***Focus of Analysis*** statement which identifies the focus of the analysis, after which ***Analysis Prompts*** are provided to help you think through the case. Immediately following the prompts is the ***Analysis Guide*** that will walk you through the analysis process for this case.

CASE STUDY 1: Laying the Foundation for the Design Phase of the ADDIE Model

* Candace the Instructional Systems Designer (ISD)\* lead, and two other ISDs were called in to work with Victor, the Performance Learning Director (PLD)\*\*, to complete the task analysis phase of a project that called for the development of a learning asset that would provide foundational knowledge about the Federal Acquisition Regulation (Parts 1-53) and the Defense Federal Acquisition Regulation Supplement (DFARS) to new hires and enable them to work in a web-enabled environment. The curriculum that had been used was determined to be in need of modification after performance gaps were noted in the acquisition workforce. During the needs analysis, Victor determined that the observed performance gaps could be tied to lack of initial training; thus, could be remedied through instruction. Through his needs analysis, Victor determined the areas in which there was a differential between existing acquisition workforce competencies and desired acquisition workforce competencies. These areas would be the focus of new instruction.
* ***Needs analysis*:** Victor identified the instructional goals and needs of the organization. In keeping with the overarching charge from the Office of the Undersecretary of Defense to create a comprehensive FAR/DFARs total immersion training course, Victor identified several areas of need among which was instruction pertaining to contracts. In the area of contracts, there were significant observable performance gaps in the following areas:
  + Contract overview
  + Contract planning
  + Contract formation
  + Contract management
* ***Job task analysis:*** Victor with the help of Candace identified desired performance competencies for the intended audience in each of the four identified areas. Candace assisted Victor in doing a job task analysis for contract planning.

After researching relevant documents and consulting with Lilly, who is a Subject Matter Expert (SME) in contracts on the FIPT, Candace and Victor identified the following desired competencies for Contract Planning that are consistent with the FPD200 competencies :

* **Understand the policies pertaining to types of contracts that may be used in acquisition.**
* **Understand the policies pertaining to selecting contract types.**
* **Understand policies pertaining to fixed-price contracts**
* **Understand policies pertaining to cost reimbursement contracts**
* **Understand procedures for selecting contract types**
* ***Learner analysis:*** Victor identified characteristics of the target audience, including their prerequisite knowledge and previous instruction in and experience with the Federal Acquisition Regulation System. An understanding of the learner’s characteristics such as background knowledge, previous work experience, educational background etc., gives the design team critical information with which to judge appropriate content and assessment levels. In his learner analysis, Victor found that the learners would be new hires with various educational and experiential backgrounds. He further found that there are no prerequisite classes for this learning asset. Victor concluded that in developing the learning asset, the design team could assume nothing of the learner relative to his/her knowledge of the course content; thus, the learning asset must provide core knowledge about the topic and build instruction so that the learner at the lowest level can acquire the background or core skills that will support the desired outcomes.
* The analysis phase of the ADDIE process provides foundational knowledge that will support the design team in the next step of the ADDIE process which is to use data from the analysis phase to guide them in:
* Creating measurable objectives that will delineate what the learner will know or be able to do at the end of instruction
* Determining and developing appropriate means of assessing the learner to validate that the learner has achieved the learning objectives
* Developing an instructional strategy that aligns with and supports the learning objectives and the means for assessing those objectives.
* **Focus of analysis:** How does the information from the Analysis phase of the ADDIE model lay the foundation for the ISD team to begin work on the Design phase of the ADDIE model?

**Analysis Prompts:**

* How do the instructional goals and needs of the organization defined in the needs analysis relate to the desired performance competencies identified in the job task analysis?
* What is the relationship among the needs analysis, the job task analysis and the learner analysis?
* How does a synthesis of the needs analysis, the task analysis and the learner analysis help the ISD team in building a framework for their learning asset?

**ANALYSIS GUIDE**

**Prompt**

* **How do the instructional goals and needs of the organization defined in the needs analysis relate to the desired performance competencies identified in the job task analysis?**

This prompt is asking you how the needs analysis and the job task analysis work together to help the ISD team prepare for the Design phase of the ADDIE model. Remember, the needs analysis identified observable performance gaps in the acquisition workforce that were directly linked to inadequate instruction; thus the gap can be remedied through instruction. The needs analysis pointed to four areas of concern: 1) contract overview, 2) contract planning, 3) contract formation, and 4) Contract management.

After completing the needs analysis, Victor and Candace conducted a job task analysis. Remember, the job task analysis was driven by the four areas that were identified in the needs analysis as areas of observed performance gaps in the acquisition workforce; and each area of deficiency was determined to be the product of inadequate training. The goal of the job task analysis is to identify desired competencies that support the learning goal of the organization. We can now see how the needs analysis informs the task analysis, and how conducting a valid task analysis is largely dependent upon data from the needs analysis.

**Prompt**

* **What is the relationship among the needs analysis, the job task analysis and the learner analysis?**

The needs analysis determines that an observable performance gap can be remedied through instruction, and identifies broad areas of content that need to be addressed to eliminate the performance gap. The purpose of the job task analysis is to identify desired performance competencies in each of the areas of observed performance deficit which are delineated in the needs analysis. These two analyses provide critical information relative to the area of needed instruction and desired performance outcomes. However, information that these two analyses do **not** provide is how to address these organizational needs in a way that is consistent with the learning needs of the target audience.

No group of learners is the same, so it is critical to understand the specific needs of your target audience. The audience analysis helps the instructional team do just that. The audience analysis is designed to identify characteristics of the target audience that will influence their learning. Relevant characteristics often include a target audience’s prior knowledge/skill-set, attitudes, motivation, an/or related experiences. For instance, when planning for this learning asset, it would be helpful for the design team to know whether the target audience has had any previous experience with contract planning and, if so, the context in which that experience was based. It would also be helpful to know what previous knowledge/experience the target audience has had in related areas that may be transferrable to contract planning.

Upon completion of the learner analysis, Victor found that the learners were extremely diverse new hires, with no consistent educational or experiential background; the new hires would be coming into this course with no prerequisite skills or course work. By knowing learner characteristics such as these, the design team is able to make informed decisions on what needs to be included in the learning asset by juxtaposing the desired outcomes (that were determined in the task analysis) with the knowledge of the target audience for whom the learning asset is being developed. In this case there is no consistency of learner background. To address the diverse knowledge, skills, and experience of these learners, the learning asset will need to contain core knowledge and skills upon which the learner can build a solid conceptual foundation.

**Prompt**

* **How does a synthesis of the needs analysis, the task analysis and the learner analysis help the ISD team in building a framework for their learning asset?**

The interrelationship of the needs analysis, the task analysis, and the learner analysis provide a rich understanding of the needs of the organization relative to areas of observed performance gaps, performance outcomes that will reduce or eliminate identified performance gaps, and an understanding of the learner’s needs relative to the identified desired outcomes. Collectively these three analyses provide valuable information about the foundational context upon which the learning asset is to be developed. Thus, there is an integral link among the needs, job task and learner analyses; they each contribute to a holistic analysis that informs and guides the instructional designers as they move through the design and development stages of the ADDIE process and build the learning asset.

***\**** ***Instructional System Design (ISD****)* ***Specialist*** *provides technical support regarding instructional design and compliance with Defense Acquisition University (DAU) curriculum development policies, practices and requirements.*

***\*\**** ***Performance Learning Director (PLD).*** *The person in this role ensures the needs analysis is completed and provides oversight on the completion of the Plan of Instruction (POI).*

***\*\*\* Functional Integrated Process Team (FIPT)*** *typically is composed of Subject Matter Experts (SMEs) and acquisition career management representatives from the DoD Services and agencies whose charge includes establishing, overseeing and maintaining relevant DAW career field competency models; certification standards and frameworks; and formally certifying that course content is current, technically accurate, and consistent with DoD acquisition policies.*