REFLECTION ON DEVELOPING ID EXPERTISE

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**BETH DANIELS**

**Summarize vs Synthesize**

Dean Jacobs wanted to “improve retention” of students enrolled in his school’s cooking program. He has retained Beth to review the cooking program, and Chef Reiner’s practices. When I read this introduction to the case, I assumed that there were problems with Chef Reiner’s practices that Beth needed to address. This is where the rookie was fooled. Regardless of whether there were problems or not, Beth would need to take a close look at the pros and cons of whatever solutions she provided, supported with evaluative data as proof that changes actually were necessary. But enrollment could be down for many reasons. Perhaps the tuition spiked, or a better program exist s across the street. The dean had only asked Beth to ‘take a look’, to review the program. Like Jack Waterkamp’s desire to climb the corporate ladder, Beth might want to show her value by offering change to the program, using her favorite theory. This plan is plausible if she has evaluated all implications of every theory through an unbiased glass and if she has the necessary supporting data. Beth went into Chef Reiner’s kitchen thinking she already had solutions in hand. “Information is the means to an end (Ertmer & Stepich, 2004).”

The case presented Chef Reiner’s checklist, and to me, as a biased constructivist artist, any daily ritual is an unwelcome task. I was completely perplexed after the assigned readings, thinking that I needed to blend theories, and apply them to the problem. But wait; initially there wasn’t a problem to solve.

**Principles vs Features**

Problem finding and problem solving. According to Ertmer & Stepich (2013), this is the core of an instructional designer’s expertise. This is the basis for ID. How well did I identify the core ID problem and provided a suitable solution? With a jaundiced eye. The rookie gets the poor rating at the door on this case, as I should have checked my assumptions. “Beth is an advocate of constructivism, and Dean *Jacobs is open to shifting* to this modern theoretical approach.” In the words of my esteemed professor, “REALLY?” Yes, again, I assumed that the dean was open to shifting, that his curriculum was mired in behaviorist theory practice. So I was off to a great start. In my writing, I pinpointed that, “According to Wilson, theories are meant to work within a particular domain and do not work quite well as you move out of that domain. Reigeluth states, “Theories can be hard to understand if they are taught (or taken out of context) abstractly.”

So why did I not listen to the quoted readings? I had a closed mind.

Additionally, I allowed my suspicions to distract me. I could not know how or at what level the program “placed” students, so I considered the reality that the placements were not in Five Star Zagat restaurants. Since 97% seemed like an unrealistic number, I assumed those flipping burgers at McDonalds padded these figures. As an ID, I should have suggested looking further back at the evaluations, rather than conducting evaluations forward to prove that constructivism was better than behaviorism.

Someone on our DB had mentioned politics in the educational environment. I can only imagine the breadth of politics, from the educational board to trustees, and in particular, the faculty. It would seem to me that to move the needle from behaviorism to constructivism would be a heavy task, particularly where it doesn’t belong. But Chef Reiner’s class *was* constructivist; it’s really a feature I missed, so I can’t really equate principles to features when I missed on both. ”Failure leads to discovery and learning (Ertmer & Stepich, 2013).”

**Relationships among Issues**

I should *not* have assumed that Chef Reiner was alienating students with his checklists, just because I personally have distaste for such particular procedures. In this field of Culinary Arts, it might be a great exercise to get students accustomed to extreme cleanliness. So, did I identify the problem? Chef Reiner may seem extreme with this practice, yet this confirms that Chef is on top of his profession. Certainly some students were disgruntled; perhaps the checklist disgruntled them. Perhaps the Constructivist practices were alienating the students. Perhaps they were better qualified for another field, and just didn’t belong in the cooking program. Beth’s bias was my own.

**Reflective vs Reflexive *Problem Solving***

As Ertmer and Stepich (2013) state: “Experts focus on what they know.” I focused on what I *didn’t* know. From the first sentence, “Beth Owens, an instructional design consultant, is being faced with a challenge; *implement* popular, effective changes to the cooking program at State College” I got it wrong. She’s not implementing; Beth's merely consulting. She’s hired to review the case, not rip the curriculum up and start over based on her favorite theory.

**Relationships among Solutions**

So, I was easily misled. This could be injected bias, just as in the Tina Sears case to come, the bias was in videos. I suggested video evaluations as a solution. But who is to trust the video editor? He can tell any story he chooses; cut out the praise for Chef Reiner and keep the juicy film where they cut up an onion and had the interviewee cry. A few tears along the way are necessary to become a great chef, so Chef Reiner could be the best teacher in the world, and changing his ways could be a mistake. Once again, practice makes perfect is a repeated behavioral process. There must be reconciliation for Beth to allow these two theories to work hand in hand.

**Consideration of Implications**

*“*Solution: Divide the class into social groups for project-based dishes.” I thought *this* was a good constructivist solution. I learned it from a master!

My worst solution was to tear up the checklist, and move it to the Rubric. I believed that it might be a concession worth exploring (only if the students paid more attention to the Rubric than I did for this assignment). It can equal the same amount of points, but in practice, if the students were checked every single day, then there would not be one single implication of food poisoning, and if students and faculty are eating the food in the cafeteria as it states, then the checklist stays. The checklist is not the problem. Removing the checklist could have health and legal implications, possibly shutting the program down.

**Rigid vs Flexible**

Overall, I was too flexible in my writing, perhaps having flashbacks from creative writing courses where even there, being too cute was just plain dumb. This has nothing to do with being flexible with your solutions! Sometimes, like a box of open donuts, I just can’t help myself! But going forward in cases, I did a better job resisting the glazing of my sentences. Like my teacher says, “Doesn’t belong here.” Being flexible however, is an expert trait. Was Beth flexible in her approach? Bias would say she was not. She would need to have a Plan B (which happens to be the first letter of Behaviorism).

***Overall Rating – “high,” “medium,” or “low”***

I filled in the blanks where there was not enough information written into the case. I became subjective. This created a problem of my own for synthesis, as I really have no experience to draw from. However, my summary was also a bit convoluted. Indeed, a paper I wrote twice, and got wrong twice. Perhaps a third time (like now) would have been the charm, in principle!

**Looking Forward**

I learned more from getting this case wrong than I did from getting any right. From this case and in actual projects going forward, I learned to pull out my magnifying glass and take a closer look at *and for* the problem. I learned in this case that the problem I first jump at might not be the problem. There may not be a problem at all! To fix what is not broken is a cardinal sin in any profession. I give myself the “low” rating for not identifying the problem, the problem that wasn’t there, and trying to solve something that didn’t need solving.

For future cases, I learned many lessons, which made me ready for more cases – where I could focus, be concise, and address the rubric. In my future career, I will look at the big picture, before honing in on a detail, especially the wrong one. I will identify the ill-defined problem with an open mind! Know your theories. Know all of them, so you can apply one or a blend of several to the specific situation. I will further study theory to consider all theories and their application to this problem, find wonderful solutions, and consider the pros and cons. Obtain and provide data for confirmation. Look forward and backwards. Again, keep an open mind.

**JACK WATERKAMP**

Previously I had never evaluated a cooking course, nor applied or blended theory with curriculum. I hope that I turned things around with this case, and better analyzed the details before writing. One thing that helped me with this case was that in every aspect I had walked in Jack’s shoes. However, advancement or promotion was never a factor in my thinking. It was in Jack’s case.

**Summarize vs Synthesize**

This case was about how Jack would use his project management bible of knowledge (PMBOK) to “deal with (extreme) time, budget (and human resource) constraints.” Jack is a ladder climber. When all constraints came crashing down around him, would he seek help from above? Communicate? Report progress? Align resources? Or just try to manage things by himself? Jack is in the planning phase of project management. I noted that when Jack wore his Instructional Designer hat, he would benefit from Rapid Prototyping, and scaling the project to a sample trial size.

**Principles vs Features**

So here was the underlying situation. The CEO stakeholder demands were unrealistic. Others in our class argued that Jack had to deliver on scope, time, budget, but I took the stance that the CEO needed push back. How would Jack use his project management skills to provide this communication? Should he take the burden on his own shoulders, make the right calls, and play hero? What about shouldering blame for failure? More likely, the situation I read was that as Jack went about things, he would experience the latter. I know from experience that deadlines and budgets are presented as firm, while behind the project management curtain, the administrator of these constraints fully realizes there is a percentage of leeway. Often and more likely, setting unrealistic expectations is merely a ploy to reduce and shorten the actual outcome. But who knows, perhaps the investors set a deadline to axe the company if they didn’t meet all projections. I could not assume, but there are three gears to project management: cheap, fast, good… pick two.

**Relationships among Issues**

*“*(Jack) must determine how to prioritize the new requirements (more work, greater scope, same budget and deadline) he has been faced with to meet the first deadline, foresee risk, manage constraints, and keep numerous stakeholders content with the results. He must also be diplomatic throughout the process.”

**Reflective vs Reflexive *Problem Solving***

Jack failed to seek help when needed. He carried too much weight on his shoulders. It reminded me of a lot my own cases where I was entrusted to utilize my project management skills, achieve unrealistic deadlines, yet operated under several layers of the org chart. But I was happy to be in the role of Video Producer. There was nowhere up to go from there, without being Communication Director, and I knew my experience was never going to promote any higher.

One lesson I was reminded of was to chunk everything possible, just as you would chunk learning as an idea. You need to address only what is due to meet your deadlines. Use focus groups to test before rolling out the entire project. This is standard operation in my world. It reduces risk, minimizes constraints, and gives a good sketch of the hierarchy environment; who needs their hand held who doesn't.

 Jack also reminded me of the importance of reporting, and whether classmates agreed or not, in Jack's situation, I would utilize the power I don't have - the power of my boss. Let the bosses duke it out, but give them an accurate picture of where the project stands, the risk of not removing the constraints, without placing blame. Lewis, the IT software manager has priorities as well. He's not to blame for anything. You just need to convince him that your project is more important than all the others on his list, and if you can't, use boss power.

**Relationships among Solutions**

Jack needed to take care of what immediately supported moving forward, and that was his own team. I did write that, “Everywhere Jack looks, there are project management challenges, and the big ones mentioned are time and budget constraints. With these come *human resource management*, communications, and dependency on instructional software development.” I also wrote, “Jack must also set priorities, and break down the work structure into manageable bites.” This was Jack’s top priority.

**Consideration of Implications**

The implications in hiring new staff was a tough call. As a project manager, with a pool of resources, I would pull the trigger. Burning out staff on a year–long project is not the solution. I believe you will then lose staff (at Amazon, they jump off buildings!), so in either circumstance there will be another hiring cycle to impede your progress. Pick your poison. A great project manager has resources. “According to readings by the case author, van Rooij (2009), “Anecdotal evidence suggests that projects for developing online instruction, particularly in educational settings, are often challenged by limited staff, funding constraints and quick turnaround times.”

**Rigid vs Flexible**

“Recognizing that the CRM product was a guinea pig for web-based products, Jack decided to use a test pilot program, using a smaller sample of tech savvy system administrators (SAs). Katherine backs him up.” Well, technically, this was not my solution, but it would be if I wore Jack’s hat. As more information in the case became available, it also became apparent that Jack needed stronger communication skills, and to work within the hierarchy hand he was dealt. But it was not necessary to work within the new scope with the same budget on the same timeline. Rather than climb the ladder, he needed to use the ladder of communication to set clear, reasonable expectations with all stakeholders to reduce the risk of failure and ensure the success of the entire project. Then, and only then, will Jack become the hero.

***Overall Rating – “high,” “medium,” or “low”***

I give myself a “high” rating on this case, since my teacher did as well. What a turnaround of events! I identified the problems and offered viable solutions.

**Looking Forward**

Analyzing this case prepared me for future projects; to think more about communication, monitoring, reporting, and best use of resources. I was extremely happy to read this case, as it made me realize that the time, money, effort spent getting my PMP could be worthwhile. Jack, thanks for all of your errors in project management. Here's to hoping that I don't continuously repeat them!

**MALCOLM GIBSON**

Relevancy to my career goals was a great motivator for analyzing this case.

**Summarize vs Synthesize**

Malcolm needed to convert face-to-face classroom based instruction to an online course, and in doing so, utilize a strategy that included relevancy of course material. The instructors believed that this conversion was a simple matter of dumping material online. Malcolm would need to communicate his plan to utilize relevancy, chunking, and the computer based hands–on activities an online course facilitates. “Malcolm must convince faculty that eLearning is an effective modality of instruction, and he has little time to accomplish these tasks.”

**Principles vs Features**

Time, budget, resources, and communication: project management fundamentals, are once again issues Malcolm will need to manage with great expertise. In addition to this, Malcolm needs to be creative in devising curriculum which blends certificate learning towards degrees, molds f2f to the eLearning world, and fills hi-tech cubicles with smart people educated within the state. With all this in mind, Malcolm is faced with creating an engaging module which features the best aspects of problem solving focused online learning, while setting aside irrelevant or bulky subject matter unfit for the online learner.

**Relationships among Issues**

*“*Malcolm doubted his ability to create meaningful learning with the existing procedural, rule-based content. His experience was in developing practice-based learning activities.

The principles of andragogy loom large here. Problem solving is at the core of andragogy. Relevancy is key. Time to learn is cut in half. The design of the focused online module is of utmost importance to convince ITC to reward. In the end, that is the goal. How Malcolm reaches that goal is through creativity and project planning. He plans to use his own intuition and SME skills to achieve this goal within the project parameters.

**Reflective vs Reflexive *Problem Solving***

In this case, Malcolm knows the subject matter. “Malcolm decided to develop a module for the Programming with PHP and JavaScript course to be added to the Web Engineer Certificate, using his methodology.” Malcolm knows the methodology, but does he knowledgeable enough to complete the module without the help of faculty? Is this a wise path to take, keeping expediency in mind? “This module would address ITS goals to better prepare students for specific jobs in the workplace – i.e., network engineer or web engineer.” Certificates are a self– funded component of internal education only for large hi-tech companies. If the college serves that void in the marketplace for small to medium-sized companies, the program will become well budgeted. It’s still up to Malcolm to create the best module possible. Whether all faculty are on board or not, that’s the goal. That’s the future.

**Relationships among Solutions**

To relate solutions, and address optimum content for the module, I suggested that Malcolm should seek some help and create relationships with the faculty. He may be an expert in his mind, but at least two heads are always better than one, particularly with college curriculum. In the cross-cultural case, relationships are more easily established in one-on-one environments. The same approach works in most situations. Then, Malcolm will create one or two allies, smoothing the path to convincing the faculty as a whole, that online learning is the wave of the future.

**Consideration of Implications**

“Most importantly, the new curriculum must address Level 3; prepare the IT learner for a sector within the industry.”I’m not sure if that was really listed as a solution, but as this is IST’s goal, it should be Malcolm’s goal. With the faculty buy-in, the second challenge (time) will be on his side. Though faculty buy-in was identified as the lowest challenge, “as Malcolm does not report directly to the faculty…” things will go easier for Malcolm if he has this support, and these relationships will bode well for his future. But without the number one concern, that the module is a sparkling example, there will be no future for Malcolm, at least at Craiger U. Perhaps I focused, or still focus, on relationships. Time is of the essence, but my perspective still stands that working in a silo is not the recipe for success.

**Rigid vs Flexible**“(Malcolm)must not paint too rosy of a picture, as facts could be found and used against him.” So if Malcolm does not get the buy-in he needs from the faculty, he still needs to forge ahead. As I suggested, this could mean looking at other courses, particularly those built by companies such as Cisco, to support his design. “Malcolm needs to spend up-front effort researching other courses, utilizing his LinkedIn and eLearning Brothers Groups to develop templates to expedite the development (actually, the design) process.”

***Overall Rating – “high,” “medium,” or “low”***

I think I identified the problem, and offered reasonable solutions. I generously give myself the “high” mark.

**Looking Forward**

I learned the most relevant information from this case and the assigned readings, pertaining to converting f2f instruction to online courses. I plan to research more, and then develop training for professors for best practices in course conversion.

**IRIS DANIEL**

**Summarize vs Synthesize**

Iris’ main challenge is “creating a prototype design for instruction that will *universally* train software application users.” To accomplish this, Iris must create universally, but in order to reach this goal, she must learn to see the world through colorful lenses; and it is not all about how she sees different cultures and their manner of conducting business, but how they see her, or more importantly, the project and differing flavors of design. Her cultural awareness and analyses of, are lacking. And neither did anyone else (such as her boss, Jim) seem to prepare her for the adventure. While my professor noted that time is typically a challenge (“isn’t it always?” – re: Malcolm’s case), in this case, time is not of the essence. However, I was concerned with time, when I probably should not have been, as it was pointed out that the project was already going on two years. Little progress was made. To me, that would place even more of a burden on time, but hey, I’m American! “But there’s more to it than implementing age–old theory with modern asynchronous design. They also need to address the cultural *content* differences.”

**Principles vs Features**

“Iris might have researched the software audience in the *Analyze* phase*;* yet she also needed to research the cross-cultural corporate behaviors of those stakeholders with whom she would interact.” (One thing I wrongly assumed here was that the members of the consortium were from seven different cultures, which could be untrue). It’s not just about cultures of the regions, but corporate cultures. Then you have power distances, and how decisive one is. But specifically, Iris needed to examine the different methodologies of instructional design used throughout the delivered regions (again, I got it wrong by stating that all members of the consortium are concerned about interactivity and engagement). “Concerned that the WBT software appeals to a universal audience” is more accurate.

**Relationships among Issues**

With communication gaps, there will be design gaps, and here the communication gaps are culturally based (which again, need to be bridged both through regional, occupational, and industry specific melding). So design and communication are very similar to any relationship. If you can’t get along, the cooking in the kitchen is going to be indigestible, as will the end design.

**Reflective vs Reflexive *Problem Solving***

Perhaps I know too much about cross-cultural relationships through my years working in these environments. “Not only do we have cultures within cultures, but micro cultures within corporate cultures.” This is why, from experience, I made the poor, bad, horrible (pick two) assumption that German engineers are the most difficult with whom to work or Jacqueline (French), to please. My Muslim analysis however, is that all cultures will blend eventually, at least in my opinion. So never judge a book by its cover.

**Relationships among Solutions**

I suggested that to design successfully, Iris must learn to communicate successfully – as Jim told Iris, she needs to “have more one-on-one discussions with Jacqueline… and meet individually as well with the other French people.” In hindsight, I don’t think that she needs to meet with everyone individually, just the ones connected to the design/development (but since there is time, it couldn’t hurt much more than the travel budget). As for design, “For this case, I would eliminate the cost of classroom-based training and keep it asynchronous, yet use an even more innovative approach – the branching narrative.”

**Consideration of Implications**

The main con implication of Cultural Integration, utilizing a branching narrative, is time to create, and since time is not of essence, I like this “One size fits all with the maximum inclusion of cultures” approach. Another implication is that it “can be confusing to all.” Yet, I believe the branching narrative eliminates the latter.

**Rigid vs Flexible**

*Experts are likely to present solutions as trail balloons, and to modify these solutions as more information becomes available. They may suggest multiple ways to address issues.*But perhaps if money were not an issue either (I have no window into this, or did I miss it?), then blended learning would be the best solution. This would depend on available facilities. In all aspects, Iris needs to be flexible, incorporating as much of the French, and other cultures of the consortium idiosyncrasies into the design. As an Instructional Designer, I learned in this case that you need to be flexible when dealing with the inherent personalities of stakeholders, regardless of where they come from, their rank and position, gender, or color of their skin. Every case and every person will be different. Cultural analysis, as James referred to in my Popplet, is the foundation for ADDIE, the ground floor upon which the entire project stands. Without this, the project will crumble.

***Overall Rating – “high,” “medium,” or “low”***

I made a few assumptions here, did not address the concerns spot on, and was weak on my Cons; however, since I identified the problem and offered a good solution (when in doubt, ask!), I would give myself a “high.” But since I’m going against my cultural grain, I’ll exercise some humility and call it a “medium high.”

**Looking Forward**

From this point forward, I will begin to incorporate cultural analysis into my ADDIE model, or whatever model I choose to use. I will try not to generalize, and ask my peers for specific cultural information about stakeholders. I will also look at the content from a cultural perspective to address all cultures, and implement the best approach for the audience. Most of all, I will continue to study my craft and work hard within the field to become the example definition of an expert: The expert designer has the experience to manage complex challenges by connecting all of the parts, the ability to intuitively apply both knowledge and technology to solve instructional design problems, creates innovative performance changing solutions and embraces on many roles in an effort to effectively and efficiently manage all tasks.

**RESOURCES**

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