STEVE VILLACHICA: Welcome to this webinar, Quality Care in Crisis Situations. We're lucky tonight to have Team QCICS with us. This team completed the OPWL 537 instructional design course last semester and did great work in coming up with training for a very complex project. And they've agreed to share what they did, how they did it. And more importantly, they're going to make themselves available for your questions and concerns.

All this gets back to the fundamental question that I'm sure is on many people's minds right now. How do students in the OPWL 537 ID course actually complete their ID projects? This team will describe the journey they undertook to complete this process. And in particular, they're going to focus on their task analysis, how they used the task analysis to write job-focused objectives, and how they use the task analysis and the job-focused objectives to create a checklist in their performance assessment instrument.

Danielle, Megan, and Joe will introduce themselves, the project, the roles they played. They'll describe how they approach creating and revising these deliverables, and they'll show what they did that worked well and what they'd do differently. So without any further ado, I'm going to turn this session over to them, and I'm looking forward to a great discussion tonight. Thank you, Team QCICS.

Megan Kennedy: All right. Thank you, Steve, for the introduction. My name is Megan. I am the person over on the left of this slide. So my role in this team project is I was actually the liaison between our group here, me, Danielle, and Joe, and the company.

I am a staff training coordinator for Embassy Management, the company that we developed this training for. And I've been in a training role with them for two years now but with the company for four years. So I was able to kind of know a lot of the background information, have access and rapport with a lot of our subject matter experts. And a lot of that was definitely helpful in getting through and getting the information that our team needed. So that's a little bit of background about me.

Danielle Schisler: All right, and I'm Danielle. I'm in the center. In terms of specific roles on the project, I coordinated meetings, I made the agendas, and I also finalized the documents before we submitted them and submitted them.

I'll talk a little bit later about how we kind of tried to divide up the work between all of us. And right now I'm working as a course developer at a company called BlueVolt. I work with our instructional designers to build out the story boards and then put them into storyline to make online modules.

Joe Desapio: All right, and my name is Joe DeSapio. By way of the project, I think I really just did what I was told. And it was a really fun experience. But I have been in learning and development or training for about seven years now. I have a background in graphic design and web development.
And for about the past seven years, I've been doing instructional design work for a number of different companies. I was a contractor for several years. And currently, I work for UnitedHealthcare. And my title is senior learning architect.

MEGAN KENNEDY: OK, so as Steve was mentioning, we're here to kind of tell you guys a little bit about our experience going through this project and especially through a lot of the analysis, the task analysis, the objectives, and building our project off of that. So in true analysis form, it's hard to understand what the training need is if we don't understand the organization, the learners, and the overall purpose. So before I get to the next slide that's going to show you where our gap was, I'm going to tell you guys a little bit of history about the company.

So the company's name is Embassy Management. They are an umbrella company, so they have multiple sub-companies. But all of the companies are human services. So each of the companies is focused on supporting individuals with developmental disabilities. And we've got anywhere from youth, adult, elderly, everywhere along those lines.

One of the big roles of the company is to really look for creating an enriched life for those individuals that have those developmental disabilities. The particular people who play the biggest role in meeting that is our direct support professional, so our front line. And they have a huge, huge skill bucket that they have to pull out of every single day.

They have to act within the legal structures of their role. They have to be able to effectively communicate, manage conflict, intervene in crisis, know about medical attention and when to assist it, in-depth knowledge of mental health, appropriate conduct. I mean, it's just a very big skill base that these employees have to use in order to achieve the overall mission.

So at the company, there were a couple things that the company wanted to see grow and change, and one of those was the reputation. They wanted to show that the direct support professionals had the skills, had the knowledge to really handle complex situations and intense crisis. Well, the baseline that they were currently seeing was that the direct support professionals weren't necessarily handling the conflicts in the best way that they were wanting. They were seeing that sometimes there were discrepancies between handling conflict and health and safety or handling conflict and resident rights.

And a lot of that was that the direct support didn't feel confident in their skills or their knowledge and were reaching out to supervisors quite a bit. And so because of that lack of confidence, lack of skill, it was actually putting a lot of strain on management to direct and guide them, and that was taking away from other opportunities. So and the ultimate goal of really trying to make sure that our direct support professionals could utilize effective and efficient de-escalation techniques that both protected the residents and reduced escalation to the on-call supervisors.

So we had to take a status of where are we at now, which was our employees were calling supervisors on-call about three to five times per week and not consistently maintaining safety and resident rights. What we wanted to get at was that they were using that on-call
emergency phone less than twice a week while maintaining safety and resident rights. And a big thing is as a team, there were multiple gaps that we were looking at.

[00:07:22.89] As we went through the analysis, as we went through this-- and both Joe and Danielle will talk a little bit about this-- there wasn't going to be the ability for perfection. We came into a group, into a company and a situation that didn't have a lot of standardized procedures. It didn't have a lot of structured ways that things were done. It was very loosely structured, very loosely held. And it was functional, but it wasn't nothing effective for their goals.

[00:07:56.10] And so as a team, we kind of had to prioritize progress over perfection, right, where is it that we want to go versus-- because in our desired performance, optimally you'd want to see the on-call phone being used none. But that wasn't going to be an achievable goal. So we went for the progress, looking for less than two times a week, showing the progress rather than perfection.

[00:08:21.11] So a little bit kind of going back into the DSP roles and the complexity of this task, because while the DSP job had a lot of aspects to it, we really wanted to focus on the most crucial one which was going to affect both the business-- It was going to affect management, and it was ultimately going to affect health and safety. So we wanted our DSPs to be able to identify and de-escalate crisis situations.

[00:08:48.81] To do this, they have to have, again, a huge bucket of skills. They had to know personalized information about every single client that they were supporting. They had to involve complex decisions and problem solving in a very short period of time. When they are in situations that individuals were upset, they didn't necessarily have an hour to get a focus group and to sit down and talk about the best solution. It was kind of like, I need to de-escalate this right now and make sure that everyone is safe, healthy, and has their rights.

[00:09:19.96] And they needed to work confidently in intense and very emotionally-heated situations. So it's very complex in that there was a lot of processing to be done in a short period of time and it was really crucial to making sure that the whole structure was successful. All right, Joe, on to you.

[00:09:39.79] JOE DESAPIO: All right, so I think what you can see from everything Megan just presented was that this was a pretty complicated project. The tasks that we were exploring and the training that we were trying to develop was really targeting not just behavioral things but a lot of higher level cognitive things of decision-making, knowing when to move forward, when to escalate things, how to interact with potentially irate residents or residents who were getting worked up. So there's a lot of what you could call soft skills or just a lot of interpersonal, relational decision-making skills that were going on here.

[00:10:34.07] And that just made our task seem very daunting. It was intimidating, for sure, when we first got into the task analysis phase. And as I said, because of the large and complex scope of the project, we knew that we had a lot of legwork to do.
So our task analysis, it really turned out to be huge, not necessarily by way of the number of pages that it ended up being but due to the amount of analysis and thought and time that went into it. So one of the things that I wanted to talk about, one of the things that I think might be helpful for you all to hear is a little bit about what I think helped us as we did our task analysis. And a couple of things came to mind.

So first of all, I think the thing that's worth calling out is that we had buy-in from the organization. And obviously when we start these projects and scope them out, we get a certain level of buy-in, approval. A company says, yes, you can do that. That's great.

But what Megan was really able to obtain for us was a very high degree of buy-in from her superiors, from the leaders over the DSPs themselves, the supervisors. She was really able to get a lot of people and leaders to say, OK, we will support this project. And so that's one thing that I would really call out as important because when you're doing task analysis, and particularly for when we were doing task analysis, not a lot of things were documented. There wasn't something where we can go and find a SOP or a job aid that had everything we were looking for on it.

So we had that buy-in. That's the first thing that I would call out. And then the next thing that I would call out is that because of that buy-in, Megan was able to go in and secure some focus groups.

We actually created a SurveyMonkey survey that we sent out to DSPs. And we did several different things to try to gain input to understand, OK, what's happening? What should be happening? What are these tasks that we kind of generally understand, we can describe, but what's really going on there so that we can put those things on paper?

And so through a lot of work, through a lot of iteration, we were able to get our task analysis on paper. And the next thing that I think I wanted to call out with relation to that is that it went through a lot of iterations. I think when you first start to put this stuff on paper, you might be thinking to yourself, man, I don't know if this is long enough. I don't know what the client will think of this. I don't know what a professor will think of this. I don't know what the client will think of this. I don't know what a professor will think of this.

One of the things that we found, working together, was that you put something on paper initially, and then you get more eyes on it. And we had a lot of working sessions where someone would put down their initial, here's how I think it's supposed to go. Here's how I think it looks. Here's how I think it looks. Here's how it's supposed to go. Here's how I think it looks. Here's what I think works.

And then we'd go away from it for a little bit. And then we'd kind of do another revision. And then we'd come back together and talk about that revision again.

And then we'd send it off to Steve, and he'd give us his feedback. So there was a lot of iterations. And I think that that's something that you should really lean into, and it's
something that we really leaned into that helped us. You're not going to nail it out of the park the first time you try to put something on paper.

And I think that's certainly also true in my experience as an instructional designer doing analysis and task analysis like this everyday at work. I've been working on something for about the past four months actually, that had a pretty big task analysis into it, and it's a constant process of iterating, and reiterating, and revising, and getting more feedback and more input. And obviously, we don't have all the time in the world in these projects, but that's something that I thought was worth calling out as well, so the number of iterations that we had and revisions that we had and feedback, even if it was just internally among our group.

And so then moving on quickly, so our task analysis was huge. There was a lot that went into it. And that also meant that our objectives were huge as well.

And I don't want to spend too much time on the objectives here, but one thing that I would call out and one thing that I think that we would agree on is that the task analysis, our team really felt was kind of the climax of the project. It was really the crux of the entire project. And once we realized that, we really wanted to focus on the fact that we need to nail this and do a really good job making this really exhaustive, because out of that flowed our performance objectives, and out of that flowed our performance assessment.

And it wasn't so much that we had to reinvent the wheel. We really were just taking our task analysis and morphing it into a set of job-based objectives. And then we were really just taking our task analysis and objectives and morphing it into a performance assessment. So you really had a lot to work with after you complete your task analysis.

So a couple other things, just about how we got it done, I think we had great team chemistry. And I think that's important because as you continue on I think in school and in our workplace, I think we would all agree that you're going to be placed on a team. Teams are just pivotal to corporate America to a functioning workplace and trying to promote team chemistry. And obviously, everyone always has different personalities. There's different dynamics in teams.

We were lucky enough, I think, to have a really great team chemistry. But that's even something to practice and to recognize. And I think that that's part of the reason we go through the team charters and different things like that to really help us think about what it means to be a collaborative working organization. And that's one piece.

We also had clearly defined roles and expectations. Obviously, Megan was kind of our lead and our liaison, as she said. And Danielle largely acted primarily-- or not primarily, but in part as a scribe and setting meetings and so on and so forth.

And I jokingly said I did what I'm told, but I didn't have one of those other roles outside of the individual tasks. But then within each piece of the projects, so task analysis and objectives, we would always assign certain things out. We would clearly understand who's doing
what, when is that due, when are we going to look at it together, and then when are we going to have revisions back. And we had very clearly defined roles and expectations.

[00:17:52.67] We did our best to spread that around evenly as well. So Danielle typically-- or I'm sorry. Megan typically-- we tried to make it to where she would do less of the revision process because she was doing a lot of the initial collection process because she was the one who actually worked at the company.

[00:18:12.95] Collaborative design thinking I think is really just a piece where I'm trying to capture this idea that not everything existed. So we came to this realization that there are certain things that we have to just put on paper. There are certain things that we have to invent and say, you know, we're not sure what's right here.

[00:18:30.94] There's nothing documented here. So let's just put it down how we think makes sense to us, and we'll come back later and get it approved or revise it. But we just have to put something down on paper. And we did that together until we came to a consensus for what we thought was best.

[00:18:49.93] And then the last thing that I think is worth pointing out is just to lean on your learning. We spent a lot of time looking at examples of work that had already been submitted. We put a lot of time looking at the criteria for the actual-- what was being expected of us.

[00:19:10.36] And we often, throughout the week, would go back to our readings, or go back to a forum, or go back to something that had been posted so that we could get a better idea of what exactly it is that we should be shooting for here. And then the biggest thing that was helpful, honestly, is that we have two passes on all of these. So we get some feedback back from Steve after our first go-through, and that's just wildly helpful.

[00:19:39.73] We had an opportunity to ask him questions. I think there was even a time or two where we asked if he could meet with us again just to discuss something and to give us a little bit more clarity. And that was something that was really, really helpful to lean into and really refine our thinking. And again, that's something that I think is a model of what happens in the workplace as you have a superior, a manager, a leader, a project leader or so on and so forth.

[00:20:07.04] So those are some of the big things. I know that's not going into really specifics of what our task analysis, objective, or performance-based assessment looked like. But as we were discussing this as a group, I think those are some of the things that we were maybe worried about and some of the things that I think really contributed to the way we were able to complete the project. So hopefully, some of that is helpful to you all. And with that, I think we'll move onto the next slide with Danielle.

[00:20:37.54] DANIELLE SCHISLER: All right, so in terms of what went well on our project, attempting to split up the workloads so that no one was really doing too much more than anyone else. Obviously Megan, since she was on site, had a lot more of that role that she was doing. There was a lot more responsibility on her in terms of getting the information from interviews
and talking to people who were there, gathering up background on the company that Joe and I just didn't have access to.

[00:21:07.24] So beyond that, Joe and I tried to take on any other help that we could on her side, checking in with her and making sure, hey, do you need any help on this? How can I help you with this part? Can we gather up these interview results?

[00:21:25.36] Another thing that went well was that we set up a regular meeting schedule. We had meetings every week. We also stayed flexible about it, though, because life happens, so keeping our meetings that we had every week but making sure to email each other ahead of time.

[00:21:43.63] Hey, I can't really do this this day. Can we meet another day? Or I think there were a couple times where only two of us met, but we tried to keep really good meeting notes to make sure that that other person who couldn't attend would be able to have those notes and know what we did.

[00:21:58.44] That also brings up having a meeting organizer and a meeting agenda, because we would get a little off topic sometimes. Sometimes our meetings would end up two hours long or something. And we kind of needed an agenda later on to keep us on track, make sure that we were hitting the topics that we wanted to hit, we weren't missing anything.

[00:22:19.79] We also kept due dates on those meeting agendas. We kept good notes about who was supposed to do what for the next week. Let's see. And feedback with each other went really well.

[00:22:32.38] Assuming positive intent was a big thing. As Meg and Joe have said, this was a really complex project. So there was a lot of throwing an idea out there and being like, does this sound right? Does this seem like the right thing to do-- and then giving each other feedback, making sure it was constructive feedback. And we were able to really help each other build on ideas.

[00:22:58.84] What we would have changed-- Joe kind of went over this already-- stressing out too much over our pass one deliverables was a big thing. I think later in the project, we finally got a little bit better at this. But in the beginning, we would kind of agonize over some ideas.

[00:23:15.46] And once we finally turned in our pass one and we would get pass one feedback and we would have our meetings with Steve, those were really helpful. And those answered a lot of our questions. And it seemed like we didn't have to put all that time into really stressing out over our pass one. We just needed to put down what we could as best we could, and get some feedback from Steve, and make sure that in those meetings, we were taking really good notes about what we could improve upon.

[00:23:45.62] And as I already mentioned, another thing we improved was the length of our weekly meeting. I would really suggest setting up a meeting agenda and making sure that you have topics lined up so that you're hitting everything, you're not missing anything, you have your deadlines there, and you know what everyone is supposed to be doing for the rest of the week.
In general, as Megan and Joe have mentioned, I think the best thing about our team was that we stayed really collaborative. There was no right answer for this project. And it was really crucial for us to be able to put ideas down and work together to find solutions. And with that, I think we're done with our part.

STEVE VILLACHICA: And I guess we're going to start posing questions. And what I'm going to do on the first one is to combine Steve and Dr. Bencscoter's question and ask, how long does a typical crisis situation last, and can you provide some typical examples of what those look like?

MEGAN KENNEDY: Joe and Danielle, if you guys don't mind, I'll take that one, or two. So crisis situations, it depends on the individual, which is part of the complexity of it, as some individual, their crisis is four seconds and they're done. And some individuals, it's like 45 minutes of just at the peak of emotion and trying to de-escalate.

But as far as where our staff are actually intervening, it's usually a very short period of time. Even if they're in crisis for a longer period of time, staff at the very beginning of that need to start making those choices of, what am I going to say, what am I going to do, who do I need to call for help if it got to or getting to that point. And so short answer to that question would essentially be a matter of seconds. Either the crisis is over, or the decision has to be made or it's not going to be effective after that point.

Some of the typical issues that DSPs handle again depends on the individual. Sometimes it's some one being just in tears over not having enough money to buy a Snickers bar and just being in crisis over that. And sometimes it was, like, property destruction and things like that.

So there were times that DSPs were put into very emotionally heated situations of like, OK, if I don't diffuse this, this person could harm their roommate or could destroy a neighbor's property, or then sometimes the less dramatic situations of, well, this person really truly honestly is having an intense amount of emotion about something that while it doesn't seem as intense to me, the Snickers bar, but it is intense to them and means just as much to them. So there's the range of everywhere in between there.

STEVE VILLACHICA: Did anyone else on the panel want to add to what Megan has already said?

JOE DESAPIO: I think we'd concur and defer to her as again, these were the kind of things that we were having to learn from Megan, right, because she has that insight. She's working for the company. So she's really the subject matter expert on the role and the company of the team.

STEVE VILLACHICA: All right, then I'm going to momentarily skip ahead to Michelle's question. Did you use any programs such as Google Docs, Asana, et cetera, to help you collaborate? Do you have any tools you'd suggest that other people use?
JOE DESAPIO: Yeah, we used Google Docs and Google Hangouts. And that was honestly pretty much it. We also had running email chains. But Google Docs and Google Hangouts was primarily it.

We would download the templates from Blackboard. One of us— I think it was typically Megan— would upload it to a Google Doc. And then she would typically do that initial iteration as she was meeting with the client. And then we would just log in and work right from that. We would have working sessions where we would be working right on the Google Doc.

And we would even have times— what Google Doc is really great for, we would use the comments section. So we would talk about doing revisions or thinking about this or that section, and we wouldn't even necessarily schedule a follow-up meeting. We would just say, let's get on the Google Doc about 7 o'clock on this day and just make sure we all agree and follow up with some of those comments.

We used Google Hangouts for our meetings just because that was the easiest thing for us to use. And then we also used the Google Hangout chat feature. So we had kind of just a running thread, messenger chat, that we would use, again, just by way of communication.

We didn't necessarily need to get on a call, didn't necessarily want to put in a formal email, but just send some short messages back and forth about different pieces of feedback that we were learning. Or if Megan just heard something from the client or if we just got an email from Steve, just kind of talk over that really quick and make a decision about how to move forward. Those are the things that come to mind. I don't know if anybody else would add anything.

DANIELLE SCHISLER: Yeah, I would add to the Google Docs working in Suggesting mode was really good for us because it was really easy to see the work that people had added to it, especially for myself and Joe when we would kind of be making— I don't want to say making an assumption about the company, but writing something about the company that we maybe weren't sure if that was the goal or not or that was the vision of the company. And we would want Megan to comment on it and know exactly where we would put that information and say, does this seem accurate with Embassy's goals.

JOE DESAPIO: Yeah, and I see Steve's question down there that I think is related to this about when we transitioned from the Google Doc to the MS Word and uploaded to Blackboard again. We would typically have a cutoff time of, say, we want this done for past 1:00 Thursday night. And so we would all have our revisions and edits in.

And then I think, if memory serves me correctly, that was a piece that was built into how we had defined Danielle's role. She was the one who once we had all those revisions in and it was past our cutoff time or when we said we'd have it, she would pull it down from the Google Doc, upload it to Microsoft Word, do one quick final— it wasn't always quick, but do one final formatting of it all, making sure it looked good by way of formatting, and then she would upload it to Blackboard.
But it didn't come out of the Google Doc until it was absolutely ready to get uploaded. We just did a formatting in Microsoft Word, because sometimes Google Docs doesn't always translate very well to that, and then uploaded it.

DANIELLE SCHISLER: Yeah, I would caution watching out for tables in Google Docs. When you pull them into Word, can get a little bit weird. So yeah, there was a little bit of formatting from Google Docs to Word. But yeah, I would typically make sure I was doing all of the final edits on Google Docs so that Joe and Megan could see it immediately there, and then pull it into Word and pull it onto Blackboard, usually the day before.

STEVE VILLACHICA: Thank you. I'd like to jump back to Bud's question of, this project seems complex. It's a very complex decision that has to be made really quickly and potentially under stress. Did you create decision tables that were part of your task analysis? And if so, how did you do that?

JOE DESAPIO: Yeah, we did. I think they were-- again, if memory serves me correctly, I think they were somewhat of a hybrid. By that, I mean they didn't necessarily follow any of the formats or models that we were necessarily working with exactly. But we did our best.

Again, because it is so complex, this is one of the things that we spent the most time on. We did our best to try to define, based on what information we had from the company, when the DSP would make the decision that this is going from a level one to a level two to a level three, because there's these various levels of escalation that do have definitions, but we tried to put more tangible language around that and put it into a decision table of, if this is happening, then they're going to wait and see if the situation escalates, basically.

And that was kind of what was hard for us, is that truly, the task was you wait. You observe. You be prepared. You be conscious of if this escalates. And then there's a definition for what it looks like to cross that threshold of the level two. And if it crosses that threshold, then you do this.

But then if it looks like this, you also might wait to see if it goes to level three, and then it-- so a lot of if-thens I think is what our decision tables looked like. But again, it was sometimes hard to put a lot of language around that because it wasn't just one-- I remember we were looking at one of the examples in Blackboard.

And it was something about how to paint a fence, I think. And we were just like, man, we should have picked something like that because painting a fence was a lot simpler than some of the things that we were trying to work with. But again, it was just that I think it's that process of just iterating and saying, what's the best way to put this on paper?

And the first time it gets down there, OK, that's kind of OK, but then just leaving it, and getting feedback, and having someone else modify it and someone else modify it. And I think that goes to our team chemistry as well, right? Like, if I worded something a certain way, by the time it was done, it might look totally different. And none of that was ever an issue. It was
a very collaborative process of just, how can I contribute to make this better, to make this a solid task analysis?

[00:35:05.19] But so yeah, we did have decision tables. They were somewhat of a hybrid. And it was definitely challenging to put them in there.

[00:35:14.78] MEGAN KENNEDY: I would have to add to that kind of what Joe said, those decision table that we were able to make, and while they-- it was very hard to put them on one piece of paper because of so many caveats to them. But it made it so much more helpful in the performance assessment because it was essentially, oh, if this was what happened, did you follow the steps as already laid out in the task analysis? So that was helpful because-- and I know Joe and Danielle both mentioned this-- having that baseline, that crutch of the task analysis just made everything else afterward flow so smoothly, and it helped out a lot.

[00:35:50.55] STEVE VILLACHICA: I'm going to go to Boone's question next. Did you ever find it difficult to schedule time with the client to get the information you needed? And if so, how did you deal with it?

[00:36:03.59] MEGAN KENNEDY: Luckily, we were local, and so I knew where all of my subject matter experts were. I knew where all my supervisors were. Our front lines were the most difficult, because they're in 30 different locations around the valley. So setting up the interviews with supervisors, with recruiting, with all of those teams was easy. I just walked into their office and said, give me a moment of your time. We're doing this.

[00:36:29.75] But sending out the survey to our staff was harder. I think even the amount that we got back from our staff was a lot less than what we would have liked. And a lot of that was because varying locations, varying technologies. So that part was hard.

[00:36:46.23] That part, we had to rely a lot on our supervisors to communicate. We had to use every resource we could because our DSPs don't have a company email address. They don't have a company computer. So it's like we're texting their personal phone like, hey, can you go on this SurveyMonkey? So that part was difficult, but the rest of it, as long as I could just go into people's office, that was easy.

[00:37:11.34] STEVE VILLACHICA: Catherine asks the question, how did you collect data for your performance analysis and for your task analysis? And then she has another question here. Were you able to collect all of the data by your first pass due date?

[00:37:24.99] I need to let you know that the due dates that appear in this current version of the course syllabus are a new edition, and Team QCICS set their own pass one due dates for a number of the ID deliverables, but they used deadlines that we established for their project description and team charter and for the task analysis and for their pass one instructional plan worksheet. So I think, if it's all right by you, Catherine, I'm going to ask the team to focus on the first question, how did you collect data for your performance analysis and for your task analysis. Is that OK by you, Catherine?
JOE DESAPIO: So yeah, so I certainly think Megan can definitely chime in to this one. But one thing that comes to my mind is obviously, like I said, we used SurveyMonkey. Megan did a lot of interviews.

But I think one of the things that's worth noting is something that Megan just said as well is that when we got that all in, seldom in a project like this or in a project for a real client, so to speak, you're never going to have just perfect data. You're almost never going to have really complete data.

So it's definitely-- we had to make do with what we got. And there was definitely a place to try to dig, dig, dig for more. But also, I think a component was when we did have data, there was a lot of work that took place that said, OK, there is something here. It might not seem like a whole lot at face value, but that's kind of why they call it data mining and different things like that. You got to really look at it and say, what can I know based on the data that's in front of me?

And I think that that was really helpful to us, and it might even lean into the second half of that question there about collecting things by your first pass. If that's a question of, I don't feel like I have enough data, we definitely felt like that a little bit, but it was a matter of, what do we really make of the data that we do have? Because it does tell us something. And so I don't know. That's just something that came to my mind about that, but Megan can probably speak more about how she actually collected it.

MEGAN KENNEDY: Well, as far as the actual data that we could gather, because again, we kind of had to go for the progress versus perfection, we knew we weren't going to be able to get as much data as we wanted back. So it was just kind of the amount that we could and analyzing it from there.

We did a lot of our learner and task analysis kind of all in one. And our performance assessment was all trying to ask the supervisors, the recruiters, the DSPs all in one survey. So that way, we weren't trying to get multiple surveys because that wouldn't have worked for them. We could barely get some of our DSPs to answer one survey versus, like, three.

So that was a lot of looking ahead to figure out what questions are we going to need to ask so we can ask them all at once. And then I kind of want to have Danielle mention a little bit because we had some deficiencies in our data as far as there wasn't a policy-- we had a policy about what we were doing, but the company didn't have a best practice for some of the ideas that we were coming up with. And so Danielle kind of had the idea to look for some external data as well, if she wants to speak to that really quick.

DANIELLE SCHISLER: Yeah, I did do some research on the library website, just looking for other projects that sounded like ours in-- well, not project, but certain research that had happened in teams of people who were working with people with developmental disabilities or seniors and these types of situations, just to see what kind of data they had drawn out of it, because as Megan and Joe have said, the results we got back from our SurveyMonkey surveys
were not incredibly extensive. A lot of people skipped questions, or just put NA or put a yes or a no.

[00:42:04.04] So I kind of wanted to dig more into other research at other companies, how they had seen people working in these situations, what kind of training programs that had been put in place at these companies, how they had changed them. So there were some instances where I looked for research outside just to see-- there are these companies everywhere across the country. So there had to have been training programs that were built that were looked at and reworked and see what we could apply to ours.

[00:42:43.33] STEVE VILLACHICA: Thank you. One other thing I'd like to add is one of the things I'm personally curious about the course is if you go into the week three performance analysis course materials, there is a performance analysis planning job aid. There's also a similar job aid for planning the learner analysis. Out of curiosity, Team QCICS, did you use the planning job aid at all?

[00:43:14.00] MEGAN KENNEDY: I think we pretty much looked at every single scrap of paper you put up there. We reached for everything because, I mean, it was as complex as this was. And yeah, I would-- yeah, we definitely used any job aid that was up there, any sort of rubric, all of that.

[00:43:33.90] JOE DESAPIO: Yeah, and so much of it I think was the newness, right? There were things that we weren't familiar with, right? We're learning about them. So yeah, we definitely looked at that, and we really, really looked at all the examples.

[00:43:49.18] Just, the more you see it, it's like, things just start to click. You have these subtle aha moments of, oh, I get it now. I see what we're trying to get at. And then you can begin to more easily morph your project and your set of tasks into this just massive thing.

[00:44:10.18] So by the end of it, our whole final project, instructional plan, was something in the neighborhood of about 100 pages or something like that. And if you would have told us that at the start of the semester, I would have been like, how in the world are we going to produce that? But it's just, again, these iterations, and leaning on all of that learning, and really just getting familiar with everything, with the examples, with the planning document.

[00:44:37.17] So yeah, totally, I think we'd all agree that they were very helpful to look at once, and then look at again, and then look at again when you're like, what are we supposed to be doing here? Well, just go back to those documents, and it starts to click, slowly over time.

[00:44:56.71] STEVE VILLACHICA: Dr. Benscoter asks, did the team have a star-performing DSP that you used as a source of task analysis data?

[00:45:07.57] MEGAN KENNEDY: I would say our star-performing DSPs might have been the only ones that filled out the survey, so yes. We were also able to-- luckily, we didn't just have to rely on people filling out the survey electronically. We had a little bit of people coming to the office, so we were able to gather other than just our star performers
But yeah, we were able to kind of draw off of people's experiences. And a lot of our management actually has in-the-field experiences as well. And we have behavioral specialists. And so we're able to draw off of real-life experiences, best practices as far as what people have done and what's worked for certain individuals, so yeah.

STEVE VILLACHICA: So out of curiosity, in my own OPWL practice when I do task analysis, sometimes I'm in a situation where I know enough to be dangerous, and I can kind of put together an initial draft of the task list and take it to my star performer and say, I know there's a lot wrong here, but it's easier to correct something that's wrong than to start from scratch. And that situation works well when I know enough that I can put together a draft.

There are other situations where I really don't know enough to even put together a draft, and we kind of have to sit together. And through a guided interview, I have to get at, what are the main things you do on this job. Now let's look at each one of those and detail it out and detail it out.

And so I get a task, and then I work into subtask, and then I work in the steps. And then I work in the stuff about tasks, like decision tables or hot tips and so on. I'm curious. Did you use either of those approaches, or something else?

MEGAN KENNEDY: I guess I'll go. Yeah, we did. So we kind of same. I had a little bit of enough information to know how to do it. But part of the thing about task analysis and I think part of it that we struggled with is-- I mean, because I work in this field, and I've done the task that we were analyzing. And so to me, I knew it was a complex task, but I'm like, oh, step one, two, three, four, five done. And then Danielle and Joe were able to be like, OK, that makes no sense. How many subtasks are there?

And so we kind of had to use a lot of those other resources to look for what the true task was and not my grouping of the tasks, so spelling those out into very, very basic things because those weren't going-- for subject matter experts, those made sense. But to a novice, they're not going to think, oh, yeah, think about the different temperatures in the room and think about this and that. They're going to be thinking, think of the well-being of the person.

So breaking it down into those more simplistic things that are truly a part of it, and that's where having those subject matter experts plus-- even, I brought some of it to novices and said, do feel like this would this help you out? And they were able to be like, well, what's this part here? I'm confused about what that's telling me to do, so using a lot of those resources. So yes, we did use those.

JOE DESAPIO: Yeah, I think Megan described it well. What it kind of felt like to me was that Megan had that kind of initial knowledge. Then Danielle and I would ask the questions. So Megan was kind of putting it on paper initially as the SME. And then Danielle and I would kind of prod into that and identify gaps from the learning and development perspective.
And then the third phase was Megan then validated the more exhaustive draft that we all came up with with her business partners. So I think it's kind of like a hybrid of both of the things you described.

STEVE VILLACHICA: Danielle, did you want to add anything to that?

DANIELLE SCHISLER: No, I agree with what Joe said. It came down to Megan had the experience with this, so she put a lot of the initial information down. And then Joe and I were able to look at it and say, well, what would come in between this step? Or how would you know to do this and this? So that helped a little bit with really getting down into those detail past the basic steps.

STEVE VILLACHICA: And I think that can be a real advantage for a team if you already have someone on the team that has some subject matter expertise. I know in my section of the ID course this semester, we have teams walking into situations where they don't have that ace up their sleeve. They don't have their own Megan.

But I think even in those situations, based on a little bit of interview data-- and then Danielle, your idea to get online and to review extant data in the professional literature is a really good one because I've used that one myself where initially, I knew nothing, but I could get online and learn enough where I could at least have something that I could draft that someone could respond to quickly.

And I think the key there is the sooner you can create something that a SME can respond to, the better. And the faster they can revise it, the better. And then the faster you can take that to non-SME people to have them do a jargon check, a reality check, the better you can be.

JOE DESAPIO: Yeah, and for what it's worth-- or I'm sorry. Go ahead.

DANIELLE SCHISLER: Oh, I was just going to add that Megan was also able to post company literature too. So Joe and I were able to get a better idea of more of the background of these processes beyond just our assignments.

JOE DESAPIO: Yeah, and I was going to say for what it's worth, not necessarily directly related to this project, but when I run into that situation where I work, at UnitedHealthcare-- because it happens a lot where I'm having to do some analysis, and even task analysis, on roles that I know nothing about-- claims processing things, just different things like that. One of the things that I constantly push for with the design teams that I'm leading is to get time with SMEs, establishing that as an expectation as soon as possible.

So I highly recommend, for any of the teams on here that are thinking about that, just go to that person. Whoever your liaison is, go to that person at the company who approved the project to begin with, and just say, hey, you said we can do this. A real big piece of what we need is some time with a subject matter expert. And maybe that has to be through email, but I
would recommend just driving for, can I have an hour or two hours with this person, or a couple of meetings with some person who is considered a subject matter expert?

[00:52:41.81] And remind them. Like, you agreed that we could do this project, so support us through it and give us access to a SME. How can we make that happen? Because I think it's so vital.

[00:52:54.61] And that's something that I have to work for even in the workplace. I'm actually dealing with something just like that this week of trying to identify, I need a subject matter expert. I need to have meetings with them. This is a full stop. I can't pull this information out of nowhere. So I have to have access to that knowledge. So anyway, for what it's worth, that's just a thought I had.

[00:53:16.42] STEVE VILLACHICA: And we've even bribed-- in my old consulting firm, we even had a project where we needed to bribe SMEs by showing up with donuts. I didn't make that up. I'd like to ask if your team had an ID lifeline, and how did this person help the team? And how do you think the team could have used their help more?

[00:53:43.24] JOE DESAPIO: For me-- and Megan and Danielle might have a different perspective-- I thought the best way she was helpful to us was just by encouraging us that we were going to make it through, and that the pressure or the anxiety that we were feeling-- and I don't mean to overstate that. It's not like we were having any kind of serious breakdowns over this project.

[00:54:09.88] But there was a certain level of anxiety there because it did seem like a really big project, not something that we had done before, especially in an academic setting, a class group project. It's just an interesting dynamic, and there was certainly a level of anxiety that was there.

[00:54:29.38] And for me, while she did give us some pointers and tips and advice, what I found most helpful was just someone who had been through it before saying, hey, I felt those same anxieties. I felt that same confusion. But you know, it'll all work out. And here's how it worked out for me. So really just hearing that person's story, I felt like it just took a little bit of a load off. So I did think that that was helpful.

[00:54:55.55] DANIELLE SCHISLER: Yeah, and I would agree, especially with being new to the process. I was completely new to the instructional design process. So it was nice to have as many people as possible behind us, kind of guiding us through and letting us know how we needed to approach things and that we can do it.

[00:55:19.24] MEGAN KENNEDY: One of the key things too that I felt like the ID lifeline helps with is, as Joe and Danielle are mentioning, it's one thing to do an instructional design project. But then also putting it into the academic realm, you're not just trying to please the client. You're also trying to please the professor. And so you kind of have that--

[00:55:38.89] JOE DESAPIO: And Steve didn't accept the donuts.
MEGAN KENNEDY: Yeah, exactly. We sent them three times, Steve. No, I'm just kidding. And so ideally those two things would line up in the same line, but sometimes, obviously in this project, my organization-- I mean, they loved the project when I sent it to them, but they're like, this is so detailed and so much. And I'm like, well, that's what we needed for the class. It's a learning thing. And so all those components needed to be there.

And so part of that lifeline was helping us not just to navigate what the organization wanted, because we knew that. It was helping us navigate what the professor wanted, like what are these expectations that he's setting for us so we make sure that we're meeting those in a way that's other linear to what the organization wants.

STEVE VILLACHICA: Ieva, no, the donuts were actually for a project involving a petrochemical factory where my colleague Art was showing up at around 2 o'clock in the morning when they agreed to do the task analysis, and no one would talk to him until he showed up with the donuts. But Ieva, as a person who's been an ID lifeline, I'd like to pitch the same question to you. How could ID teams use your help more? And please feel free to unmute yourself and give us your take.

SPEAKER: It's difficult to say if teams would use an ID lifeline the same way. Given conversations that we've had among ID lifelines so far, it sounds as though the different compositions of teams in terms of levels of experience and comfort level with what you're walking into may mean that you would want to pull on your ID lifeline more or less as you go.

And I think trying to find out how collaboration works-- if you haven't done a team project before or your experience with team projects is relatively low, that's another thing that I think ID lifelines can speak to, not only as people that have gone all the way through the ID class, but gone through other project class probably as well and can sort of speak to, yeah, I've worked with many different teams.

And this reminds me of some of the things that we ran into with team members and how did we resolve problems that seemed kind of difficult at the time-- schedule problems or a team member going dark or something like that. So it will depend very much on the composition of the team.

But I think that asking questions about process and how can I take advantage of the professor's help for me. If I'm stuck in this way, what am I supposed to be doing. And sometimes it's just somebody connecting you with the right resources.

Like, oh, wait, have you tried checking out the book? You've been in your job aids a lot lately. You've been in your course materials a lot, but have you gone all the way back to this other source material that you were looking at at the beginning of the course that might have your answer?

It's a lot of information. It's like drinking from a firehose. So having somebody sort of reconnect you with the appropriate resource may be helpful.
JOE DESAPIO: And hearing Ieva say that, I would definitely second it in that our ID lifeline, as she was talking through her experience-- I'm being reminded now-- it wasn't merely just encouraging to hear that someone else made it through, but it was hearing someone else talk about the experience on the project I think just prodded our thoughts about, oh yeah, we can go back and look here, and go back and look there, and use this bit from over here.

So she wasn't just saying, hey, pat us on the head. You'll make it through. I didn't mean to communicate that. But hearing about her experience just gave us some more ideas, gave us some more confidence, helped us see things, again, in a different light, those kind of subtle aha moments that make things slowly but surely click.

STEVE VILLACHICA: Well, I think the one nice thing about the lifeline is Dr. Benscoter and I selected these folks on the basis that they did really well in the course and did really well on the program. And these folks have volunteered to donate up to five hours of consultative support to ID teams.

And so were I in an ID team and, like Michelle, thinking about some of the anxiety that's kicking in now, I would be thinking about where and when do we want to cash in this golden ticket, and how and where do we want the help of our lifeline. The other thing is I'm busy recruiting a larger team of ID lifelines. So if you use up your five hours with the lifeline you have, we're looking to have more lifelines that can come in off the bench.

With that and the conversation now shifting to donuts, I'd like to thank our panel team, QCICS. Thank you for your good work that you did in this course. Thank you for sharing your expertise and your experience with all of us.

And to everyone who is part of this webinar that we'll be recording and distributing on the OPWL website, thank you very, very much. It's been a great night. Thank you all.

JOE DESAPIO: Thanks, Steve. Thanks, everyone.

STEVE VILLACHICA: This concludes our webinar. Thank you for being here.