Chapter I

Concern Matrix: Analyzing Learners' Needs

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ABSTRACT

Instructional development (ID) is a systematic and systemic process used in developing education and training programs. In the analysis phase, instructional developers need to account for the characteristics and particular needs of learners in order to design useful instructional interventions. It is very important to ascertain which learners' characteristics are most crucial in instructional decision making. However, current ID models seem to advocate a pedagogical approach that treats the learner submissively during the analysis phase of the ADDIE process (Knowles, 1984). There is no active communication between instructional developers and learners during the learner analysis process. In-depth analysis identifying learners' concerns and perceptions are usually not considered. In this chapter, we will introduce for use by instructional developers a learner analysis matrix that incorporates learners' levels of concerns and perceptions at the personal and organizational levels. The

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learner analysis matrix can be used to identify four areas of learner concern: (1) individual compatible, (2) individual incompatible, (3) organizational compatible, and (4) organizational incompatible.

THE IMPORTANCE OF LEARNERS

Instructional development (ID) is a systematic and systemic process used in designing and developing education and training programs. There are many ID models that have been created; however, most have as a main element a process consisting of five activities or stages called ADDIE: analysis, design, development, implementation, and evaluation. In the first phase, analysis, learners' learning needs and characteristics are analyzed (Kemp, 2000). In order to successfully implement a training intervention, instructional designers must know the specific characteristics of the target group of people. It is very important to ascertain which learners' characteristics are most crucial in instructional decision making (Molenda, Pershing, & Reigeluth, 1996).

Most ID models address the importance of learner analysis. For example, Molenda, Pershing, and Reigeluth (1996) recognize three areas of learner analysis in their business impact ID model: entry competencies, general characteristics, and learning styles. Kemp, Morrison, and Ross (1994) advocate in their model that learner analysis is the second procedure in developing an instructional program. Also, Heinich, Molenda, Russel, and Smaldino (1996) present their five-step linear ID model and emphasize that analyzing learners is the first task with three sub-areas: general characteristics, entry competencies, and learning styles. Rothwell and Kazanas (1992) identify three basic categories of learner characteristics in their 10 steps of the instructional design process: (1) situation-related characteristics, (2) decision-related characteristics, and (3) learner-related characteristics. Smith and Lagan's (1993) model locates analyzing the learning context as the first phase of ID. Kemp (2000) suggests learner analysis consists of the learners' emotional, physical, psychological characteristics, family and neighborhood relations, as well as detailed personal and academic information.

Hence, learner analysis among several ID models means reviewing the learners' characteristics before designing an education or training program. Usually, the models indicate that three types of information are gathered in learner analysis:
- general characteristics (e.g., grade level, gender, job or position, and cultural and socioeconomic factors);

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