



4.1 | Apply: Context Analysis Checklist

Expanded version of Table 4.6 from Streamlined ID (2027), a Streamlined Checklist for Context Analyses.

A STREAMLINED CHECKLIST FOR CONTEXT ANALYSES

Use this to checklist to analyze the contexts for your instructional design project, customizing as needed to address the specifics of your project learners, content, and contexts: the performance, learning, and cultural contexts.

PERFORMANCE CONTEXT – Physical Characteristics

- ☐ In what type of physical facility or program will the learner use the new knowledge and skills following the instruction? Is the performance context high risk, extremely variable, or an unknown environment?
- ☐ What type of equipment and resources will the learner use in that environment? Can those items be included in the learning context to promote transfer and if not, can they be adequately simulated?
- ☐ Will the learner be held accountable for knowing and using the new information? To whom will they be accountable? Will the learners' performance be observed and judged?
- ☐ If there are several performance contexts, are those contexts physically different? Are there differences in what the learner must know for each context?

PERFORMANCE CONTEXT – Support

- ☐ What support will the learners receive in the performance context to enable them to use the new knowledge and skills learned in the instruction? (e.g., provision of the necessary resources, equipment, and management support)
- ☐ What rewards will be provided to encourage the learner's use of the new knowledge and skills in the performance environment?
- ☐ What consequences will result or be imposed if the learner does not use the new knowledge and skills?

PERFORMANCE CONTEXT – Social Aspects

- ☐ Will learners work alone or in groups in the performance context?
- ☐ Who do learners work with and how might those relationships impact their ability or willingness to use the new knowledge and skills in the performance environment? (e.g., employers, subordinates, superiors, peers, type of customers, instructors, etc.)
- ☐ Are the learners likely to be praised in front of peers for their performance, and will their peers view that praise favorably? Will peers resist the learners' use of new knowledge and skills?
- ☐ What is the ethical climate of the performance context and how might that impact the transfer of learning?

PERFORMANCE CONTEXT – Relevance of Skills & Knowledge

- ☐ How relevant are the new skills and knowledge to the actual performance context?
- ☐ Are there physical, social, or motivational obstacles that make the use of the new skills impractical or irrelevant?
- ☐ Is the instruction being developed as part of a change initiative and, if so, have the proposed changes been thoroughly researched and communicated to the learners?
- ☐ How critical is the instruction to the learner's job satisfaction, effectiveness, and advancement? How long is it likely to remain relevant to the learners' work responsibilities?

LEARNING CONTEXT – Factors that Impact It

(The learning context should be designed to be as much like the performance context as possible to facilitate the transfer of new knowledge and skills.)

- ☐ What content is to be addressed and how extensively? For what purpose?



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- ☐ Will the instruction be asynchronous and/or synchronous? Will the instruction be instructor-led, self-paced, scheduled, or open-ended? Will it be organized as a Community of Learning or a Community of Practice?
- ☐ What other factors from Tables 4.4 and 4.5 may impact the learning context?

LEARNING CONTEXT – Physical Characteristics

- ☐ How many physical instruction sites are involved? If there are several, will the instruction be delivered to all sites simultaneously and require synchronous connections between sites? Will there also be participants connecting virtually?
- ☐ What are the characteristics of the available facilities, equipment, and resources (including connectivity)?
- ☐ If the learning context is online, will it be synchronous (learners experience the instruction simultaneously, in "real-time") or asynchronous (learners access the instruction at their convenience, at different times and from different locations)? Or blended (a combination of synchronous and asynchronous)?
- ☐ Are all the tools available that are necessary for meeting the instructional goal?

LEARNING CONTEXT – Personnel or Time Constraints

- ☐ Are there any limits in personnel resources or time of availability that characterize the learning context?
- ☐ Will learners be allowed to begin and complete the instruction at any time, or must they adhere to a pre-established schedule?
- ☐ Will learners have to complete the instruction autonomously or is interaction with others possible/desirable?

LEARNING CONTEXT – Compatibility with Learner Needs

- ☐ How well can the performance context be simulated by the learning context to facilitate learner transfer of new knowledge and skills?
- ☐ Is the site convenient for learners?
- ☐ If learners have special needs, will the physical or virtual site accommodate those needs?
- ☐ Is there adequate space and equipment for all learners?
- ☐ What sort of distractions may challenge learner abilities to concentrate and engage with the instruction?

CULTURAL CONTEXT

(consider both global social cultures and any organizational cultures)

- ☐ **Related Factors to Consider in the Design** – Are there cultural social or organizational factors that should be considered in the instructional design?

CULTURAL CONTEXT – Introspection

- ☐ **Cultural Awareness and Humility** – What have you noticed about your own cultural identity and frame of reference that could potentially impact your instructional designs?
- ☐ What statements can you write down concerning your own values, assumptions, experiences, and worldview?
- ☐ Can you determine whether your assumptions about life, the world, and people are universal or in line with the target audience's assumptions?
- ☐ How can you avoid an ethnocentric design – that is, one based primarily on the values and standards of your own culture?
- ☐ Do you identify with and understand the culture of the organization sponsoring the ID project, or do you need to find out more about it to ensure that you do not inadvertently design instruction that is irrelevant or even offensive to the learners?
- ☐ **Sociological Shift** – Have you been able to determine how the target culture views your own culture?
- ☐ Do you need to take steps to become more attuned to the target culture's view of the instruction you will design and deliver?
- ☐ Are there adjustments you can make to the way the content is presented to improve its acceptance?
- ☐ **Pedagogy** – What are the typical goals for instruction and education in the target culture?



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- ☐ What is the tolerance for ambiguity and uncertainty in the target culture, and should that influence the pedagogical approach you take in your design (e.g., Instructivist versus constructivist)?
- ☐ **Instructors and Facilitators** – How does the target culture view authority? Would they be more comfortable with didactic instruction provided by an authoritative instructor, or would they prefer a facilitator that seeks to foster topic exploration, discussion, and knowledge construction?
- ☐ If designing for instructor-led instruction, should the preferences or comfort level of the target audience be considered when identifying desirable instructor characteristics or when preparing the instructor for the task? (E.g., is there a desirable instructor gender or age based on the target learners' social or religious culture or based on the view of the content in that culture? Should the instructor be briefed on gestures or language that are innocuous in the instructor's culture but may be offensive in the target culture?)
- ☐ **Group vs. Individualized Instruction** – Is the target culture more individualistic or collectivist? For example, how much emphasis is placed on collective achievements and relationships, versus individual creativity, effort, rights and responsibilities?
- ☐ How might that dominant orientation impact the use of group work and team-based learning experiences?
- ☐ Will the audience consist of a mixture of supervisors and subordinates, or a mix of socio-economic status? If so, in that culture could that mixture complicate or inhibit effective group interactions?
- ☐ **Accommodation** – How does the target culture view the needs of individuals who are physically challenged, intellectually challenged, or who are challenged in other ways?
- ☐ Would customizable instruction designed to accommodate individual needs be expected, or viewed as unnecessary?
- ☐ **Learner Control** – How might the culture's philosophy on the purpose of education impact whether learners are comfortable with discovery activities that allow them to control the direction of their learning?
- ☐ Might the target audience be more comfortable with and learn more from instruction that features a predetermined, predictable path?
- ☐ **The Design Process** – How is time viewed in the target culture? How is that viewpoint likely to impact how you set and prioritize schedules, deadlines, meetings, and reviews?
- ☐ **Organizational Culture** – How can you align the project with the organization's purpose, mission, vision, and goals? How might those elements impact the design of the instruction?
- ☐ What formally stated and informal, unstated information can you find concerning the organization's values? Do those values appear to be shared by all levels of individuals in the organization?
- ☐ What impressions of the predominant culture and climate do you glean from the organization's efficiency indices, quality control reports, productivity reports, sales and customer satisfaction reports, safety records, absenteeism and turnover records, employee demographic data, formal structures and policies?
- ☐ What are the primary work functions of the organization and what type of people perform those functions?
- ☐ What type of reward systems and forms of recognition are typical of the organization?
- ☐ What are the leaders' expectations for training? Are they supportive of training? Are they willing to mentor new hires?
- ☐ What are current employee attitudes toward previous training efforts?
- ☐ What type of on-the-job reinforcement is provided for training? Are there on-the-job factors that create barriers to the successful use of new knowledge and skills?
- ☐ What are the attitudes of management and employees concerning compliance with external regulating agencies and legal requirements?