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INSTRUCTIONAL DESIGNER LEADERSHIP: LEADING FROM THE MIDDLE

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By

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Abstract

Instructional designers (ID) in higher education are the nominative leaders of ID teams consisting of IDs, faculty, and sometimes other creative and media professionals. ID practice is complex because it involves the application of many different theories, concepts, and procedures in the development and design of instructional courses and interventions. The purpose of this study was to examine ID practice from the perspective of IDs working in higher education. The study was intended to provide recommendations on how IDs can improve their leadership of collaborative teams. The researcher employed a phenomenological methodology in which 15 IDs from seven different higher educational institutions were interviewed to gather their experiences with ID practice. Thematic analysis was used to analyze the data. The results of the analysis revealed three main themes: relationship building, leading collaboration, and leading without authority. The solution involves the formation of communities of practice (CoP), adaptive leadership, flexible application of instructional theories and concepts, and leadership development for IDs. This study has implications for how IDs lead ID teams, as well as how they apply theory to practice.

Keywords: Instructional design, communities of practice, adaptive leadership

Dedication

To my parents, Bill, and Alice Gies, who encouraged me through some of the toughest times of my education. It is because of you that I did not quit.

Acknowledgments

It would not have been possible for me to complete this journey without the help of many people. Thank you to my committee chair, Dr. Bill Raynovich, for your patience, eye for detail, and willingness to challenge me throughout this process. Thank you to my second committee member, Dr. David Bentz, for your sage advice all along the way. Your willingness to share your knowledge and experience with others is a testament to your character.

My father-in-law, Gene Hausladen, has been one of my biggest supporters in this endeavor. I want to thank you for your encouragement and support over the years. Your belief in me has made a difference.

There is no way I could have completed this journey without the help and support of my colleagues, who are all skilled and accomplished instructional designers in their own right and deserving of recognition. Instructional design is a harder job than it appears from the outside, but as many others have observed as well, you make it look easy.

Finally, thank you to my wife Becky, and children, Tony, Anneliese, Josiah, Megan, and Shaina for supporting me in my educational pursuits. You inspire me and I learn from each of you everyday things that I could not learn from books. All of my accomplishments would mean nothing without you. I am not perfect, but at least I have you.

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CHAPTER ONE: INTRODUCTION

Introduction and Background

Instructional designers (ID) are often required to confront challenges and

adversities during the designing and developing of courses and projects. IDs partner with

faculty members, subject matter experts (SMEs), and sometimes other ancillary members

of the development team to create online courses that are effective and engaging within

the higher education context. The roles of IDs include being able to apply their

knowledge of teaching, learning, and technical expertise to help course development

teams design and develop courses that are effective at helping students learn (Decherney

& Lavender, 2020). IDs are often also responsible for managing complete course ID

projects from beginning to end. These varied responsibilities require a great deal of

technical expertise, and interpersonal skills, especially those involving leadership. ID

practice is complex. Doing it well requires IDs to understand teaching and learning

theories, design theories, and the ability to influence others. This dissertation in practice

sought to better understand how IDs experience their roles in higher education.

Time pressures, resource constraints, technical challenges, design problems,

interpersonal conflict, and reluctance on the part of course or project faculty are just some

of the issues that arise with many projects. The academic preparation of most IDs, which

is often limited to learning technical skills and ID processes, does not prepare them well

to confront these challenges (Anderson, 2012). Moreover, the technical challenges

increase with the constant advances of learning technologies (Sharif & Cho, 2015). The

rapid pace of advancement and pressure to innovate can also increase the reluctance of

faculty to partner with IDs on course design unless they have effective institutional

support and are aware of the benefits to student learning (Nicolle & Lou, 2008). IDs can

be an effective element of the institutional support framework, while also being

advocates for enhanced effective uses of technology and pedagogies to support student

learning.

Leadership and Followership on ID Teams

ID is often undertaken by teams consisting of one or more IDs, faculty, and

sometimes other creative or media professionals (Brigance, 2011). These teams

generally do not have anyone in a formal leadership position with the authority to make

decisions for the team (Hart, 2020). However, given that higher education leaders

acknowledge the need for design and technology expertise in the design and development

of online courses, IDs are often required to make important decisions about course design

on behalf of the team (Reiser, 2001). IDs need to be able to influence teams to accept

decisions based upon the IDs' expertise and experience. Since they lack formal authority

over design teams, IDs need to create this influence in other ways that are ethical and

effective. In other words, they need to lead without formal authority or positional power.

One historical view of leadership was that leaders were born, not made. "The

Great Man Theory," as it was known, held that leadership is exercised by people with

innate abilities for leadership that others did not, and could not possess (Cawthon, 1996).

This meant that only relatively few people could be leaders and everyone else had to be

followers. It has also led to the belief that followers were somehow weak or deficient,

which is a view that is still prevalent in modern times (Kellerman, 2008).

More recent theories view leadership as more of a social influence process that

can be exercised by anyone given the appropriate context (Kruse, 2013). Influence can

come from many sources. For example, noted leadership author and speaker Larry

Dressler (2011) wrote that being charismatic and articulate was important for gaining

influence, but so, he wrote were listening to others' perspectives, understanding them,

and finding common ground with them. The development of shared perspectives is at the

heart of the social influence process, as described by the social influence network theory

(Friedkin & Johnsen, 2011). As small groups, such as faculty and IDs on ID teams, work

together to design courses, they can influence each other by listening to each other's

perspectives and offering their own perspectives. Ultimately, the goal is to arrive at a

consensus on the design. If IDs can demonstrate their special skills and knowledge

related to design and technology through their interactions with faculty, they gain the

requisite "expertise" status that, according to social network theory, will improve their

influence over the team.

　　　　Given that leadership is a social influence process that anyone with influence can

realize, being a follower should not be viewed as a weakness.   Indeed, the labels "leader"

and "follower" may not really have a place on ID teams. When fully engaged in the work

of the ID team, all members may be properly thought of as leaders. Conversely, they

may also be properly thought of as followers, as they are all following one of the main

goals of higher education, which is to produce designs that help students learn. It is this

latter role that Thomas and Berg (2016) referred to as "effective followership" (p. 208).

Effective followers are actively engaged with each other in the pursuit of organizational

goals. Those goals themselves may be thought of as the leader. As a practical matter,

however, there are certain aspects of design that IDs will be expected to take more of a

leadership role over. These include project leadership, design, and innovation.

Project Leadership

ID teams work under several expectations. Among those, are that the instructional products they produce (whether they be entire courses or specific elements of courses) will be effective at achieving educational goals, and not exceed a specified budget (if known) and be completed on time. These expectations are facilitated by effective project leadership as exercised by IDs themselves (Russell, 2000).

Design

In the context of this research study, design is a process people employ to achieve something that is desired. The specifics of the process will be dictated by the desired end goal. However, designs often begin with ambiguity about how to achieve the end goal, and it is through IDs' interactions with stakeholders and initial ideas and prototypes developed in the early stages of design that help them to understand the needs to achieve their goals (Tripp & Bichelmeyer, 1990; Yang & Huang, 2014). Design itself is complex and unpredictable, given that it is inherently non-hierarchical and transformational, with earlier solutions transforming into better solutions (Carroll & Rosson, 1985). The nature of design as complex and unpredictable provides important context for the work of IDs. The complexity and unpredictability of design mean that leading design projects is itself complex and unpredictable. This places further importance on IDs' design expertise, as well as on their ability to lead ID projects flexibly and confidently.

Further complicating the work of IDs is the fact that designing instruction adds another layer of complexity. As a subset of design, ID has all of the complexity and ambiguity described above. Furthermore, it has the added complexity that stems from the need for ID products to be educational. Individual differences among learners make the

success of any given instructional intervention impossible to guarantee (Larson, 2009).

IDs must always keep in mind that every design begins as a conjecture, derived from

abstract ideas about expected educational goals based upon their design and pedagogical

expertise (Gibbons, 2011), couched within the specific context and content provided by

the faculty or SME who represents the discipline for which the design is being created.

Innovation

Innovation is often seen as a critical aspect of leadership (Rogers, 2003;

Rosenstein, 2013). Leaders are expected to be forward-thinking, recognize the need for

innovation, and be creative problem solvers (Greenleaf, 1977). The complex nature of

designing instructional interventions, along with the rapid advance of technology requires

IDs to frequently survey the technology landscape and match technology to needed

solutions.

The Leadership Activities of IDs

IDs rarely occupy formal leadership roles in their organizations or on

development teams (Shaw, 2012). However, their roles do require them to carry out

critically important tasks that are frequently associated with leadership. Among these

are:

- Influence others (Ashbaugh, 2013)

- Organize people and resources to achieve organizational goals (Sharif & Cho, 2015)

- Build and maintain strategic partnerships (Anderson, 2012)

- Drive innovation and change (Ashbaugh, 2013)

- Promote productivity (Anderson, 2012)

- Enable others to act (Ashbaugh, 2013)

A greater understanding of IDs' experiences provides insight into the potential for

IDs to take on these challenges. Since IDs work on such a wide variety of projects and in

a variety of organizations with differing processes, cultures, and expectations, they often

experience widely varying leadership challenges. Moreover, the roles IDs fill in their

organizations often require them to accomplish both leader and follower tasks. This can

lead to ambiguity for IDs and others in their organizations as to the roles of IDs

(Hokanson et al., 2008). A greater understanding of IDs' experiences will help ID

leaders to determine if IDs' leadership development is sufficient to meet current and

future challenges. It may also help in crafting more accurate and tailored job descriptions

for IDs. The need to fulfill both leader and follower roles is not unique to IDs. This is

especially true in higher education, as colleges and universities are typically organized

around a model of shared governance (Pearce et al., 2018).

Gaining a better understanding of ID roles requires careful observation and analysis.

Knowing how IDs see themselves in their roles, and the challenges they face is essential

for understanding how to fully prepare IDs for success in the academic milieu. This

phenomenological study of IDs who have experienced the challenges of ID in institutions

of higher education aims to contribute to that understanding.

Statement of the Problem

IDs working in higher education fill a role that often requires them to shift back

and forth between leading and following with alacrity. To know when to switch between

those roles, IDs often rely on intuition, instinct, experience, and situational awareness.

The emergence of leaders is key to enhancing group performance, and plasticity in

leader-follower roles can create problems in social relationships (Van Vugt, 2006).

However, there are contexts in which dynamic and fluid leader-follower roles can work

effectively (DeRue, 2011). This study showed that IDs work in a collaborative

environment. Within this environment, IDs work with others to provide structure to

unstructured design problems that begin with uncertain outcomes, are impacted by

changing goals along the way, for which success can be hard to define, and for which

there may be several acceptable solutions (Bigelow, 2004; Rosenberg, 2011). This study

also showed that IDs themselves feel that they need to take ownership over all aspects of

the design process, that they also recognize that there are times when they need to

provide the vision and encouragement of a leader and times when they need to fill the

role of an active follower, taking direction from others while also providing honest and

constructive feedback.

Learning more about the ID role from IDs themselves helped to better understand

the context within which IDs work. Given that online education is expanding (Seaman,

et al., 2018; Wallis, 2020), IDs can expect to play a larger role in the design and

development of courses. This will mean more frequent contact between IDs, faculty, and

other members of institutions of higher education. Much that is currently known about

ID practice indicates that it is complex and changing (Sharif & Cho, 2015). The number

of models that claim to accurately describe the design process also contributes to the

challenge (Dick et al., 2004; Allan & Sites, 2012; Russell, 2015; Hamilton, et al., 2016;

Arshavskiy, 2019; Bond & Dirkin, 2020). We need to know more about the dynamics

involved in the plasticity of IDs' leader-follower roles, how that impacts ID practice, and

how to better prepare IDs for their roles. This study was situated within that context of need.

Purpose of the Study

The purpose of this phenomenological study was to investigate the individual leadership experiences of IDs and to shed light on the challenges that IDs face now, as well as those they anticipate in the future.

Research Questions

IDs perform a variety of tasks related to developing instructional products for learners in several organizations. One of the main tasks of IDs in any organization is to solve instructional problems using an array of skills including problem-solving, communication, relationship-building, the application of learning theory and design models, and educational technology tools (Gerin-Lajoie, 2015). The academic preparation of IDs seldom includes instruction in all of these competencies (Summers et al., 2002), and advances in technology and the introduction of new design models can create a condition in which it is difficult for IDs to keep up with changes (Sharif & Cho, 2015). Many of the skills that IDs need to be successful in the field resemble the interpersonal skills that leaders need to be effective (Fritz et al., 2005). However, IDs' leadership development experiences may not always be adequate to meet those needs.

Research question: What are the lived experiences of IDs working in higher education in leading course design and development teams and in leadership development? Secondary research questions include:

1. What source or sources of influence are available to IDs?

2. How do IDs use influence?

3. What are IDs' goals in the use of influence?

Aim of the Study

The aim of the study was to provide ID leaders with recommendations on how to understand leadership from an ID's perspective and to improve leadership development experiences for IDs to help prepare IDs for current and future challenges.

Methodology Overview

This study employed a phenomenological approach to explore IDs' experiences as leaders on ID teams. The researcher sought to uncover shared meaning in IDs' experiences as leaders. Given the complexities inherent in ID and the social construction of leadership, the researcher believed that a qualitative approach would be useful to capture the fullness of the ID experience. In this study, IDs' experience as leaders was viewed as a phenomenon worthy of study. Shaw (2012) wrote that some studies have been published asserting that IDs can provide essential leadership in higher education, but very little research exists on how IDs themselves experience leadership. This study aimed to help fill that gap.

Definition of Relevant Terms

Some terms used in the study may have different meanings to different people, for example, the term "instructional designer" may not be found in all job descriptions of those who engage in instructional design. The following terms were used operationally within this study.

Instructional design: Activities that are undertaken to analyze audiences, content, contexts, and situations to create courses that meet established objectives and are deliverable within a specific context (e. g. online).

Design: Deliberate, purposive planning undertaken to achieve an outcome that

achieves a specific purpose or end.

Faculty: An individual employed by an institution of higher education in a

teaching and course development role.

Higher education institution: A school (such as a college or university) that

provides education beyond high school.

Instructional designer (ID): An individual who is employed to work with faculty

and other members of ID teams with the responsibility of ensuring adherence to

good design practice. These individuals also typically have the responsibility of

ensuring adherence to established processes and schedules, developing and

maintaining relationships with faculty, contributing to process improvements, and

solving complex design problems.

ID teams: The phrase ID teams is used in this paper to refer to teams that are

formed for the purpose of designing instruction. They can consist of only IDs, but

may also include faculty, SMEs, and others involved in the production of

instructional media.

Subject Matter Experts: Individuals who have a mastery over specific content.

Delimitations and Limitations

The limitations of this study primarily involve the sample size, selection, and

target population. This study employed a convenience sample; thus, the results are not

generalizable to the greater population of IDs. The study is delimited to IDs working in

higher education and excludes those working in non-post-secondary educational

organizations. It was further delimited by geography, as most of the participants were

from the same region of the United States (the Midwestern US), possibly even from only

a few schools in the region. This means that the experiences that are captured for the

study will not include the full spectrum of IDs.

Leader's Role and Responsibility in Relation to the Problem

There is a strong leadership component to this dissertation in practice. IDs serve

a leadership role in colleges. Ashbaugh (2013) argued that IDs should approach their

work from the perspective of personal leadership. Keeping their vision and values in

front of them, especially as it relates to the design and development of innovative

courses, is essential. Personal leadership transcends instructional and learning theories

and brings a moral purpose to the work of designers (Ashbaugh, 2013). The reality is

that IDs accomplish course design by working "with and through other people"

(Koszalka et al., 2013, p. 65). In addition to faculty, the other people with whom IDs are

involved in course design work can include content experts, supervisors, managers and

executives, media specialists, evaluation specialists, learners, and technology support

staff (Koszalka et al., 2013). With such a large and diverse group of stakeholders at the

table, IDs need to work to create and maintain many relationships to have effective

influence over the process and results of the design. Managers and executives may be the

ones who ultimately make big decisions that will have a ripple effect across the team and

throughout the design. There will be many stakeholders vying to have their voices heard.

The lone voice of the ID can get lost in the multitude of voices. To be effective at

supporting faculty and student learning, IDs need to be effective at finding their source or

sources of power and then using their power effectively and judiciously to exert influence

over the managers, executives, and other stakeholders to create the desired outcomes. In

other words, IDs need to be good at leading from the middle of the organization.

Leading from the middle is a socially constructed phenomenon that occurs in

organizations when there are followers who are committed to playing an active role in

achieving organizational success, and leaders who are willing to listen (Carsten et al.,

2010; Chaleff, 2008; Kellerman, 2016; Thomas & Berg, 2016). Even though IDs rarely

have formal authority within their teams, they can influence how the teams operate and

the outcomes the teams achieve. The central role that IDs play in design and

development, along with the expert power they possess that comes from their knowledge

of design and development, gives IDs a source of influence they can tap into to make a

case for their own leadership. The follower label is negotiable and transferable,

especially in situations in which team members outside of the formal leadership circle

have much to offer the team by way of clarity and credibility (DeRue & Ashford, 2010).

IDs can offer clarity to the design team through their knowledge of design and design

processes. The credibility they can offer comes from their deep connections to other

members of the team and the work they do on behalf of the team (Haslam et al., 2011). It

is these connections and the leadership skills IDs need to work on to build credibility.

The greater success IDs have at shaping the team's collective perception of their

leadership ability, and the IDs' association with the team, the greater their influence will

be (Steffens et al., 2015; Tee et al., 2013).

For decades, scholars have been trying to identify traits, or characteristics, that are

common among good leaders (Fritz et al., 2005; Haslam et al., 2011; Popper, 2004).

Many scholars contend that effective leadership does not stem from specific

characteristics. Rather it stems from effective leadership behaviors (Braynion, 2004; Harland et al., 2005). However, those behaviors may vary by situation. Behaviors that are effective for military leaders may be different from those required for leading collaboration on course design and development. Therefore, the leadership context present in course design matters.

Effective leadership development for IDs should promote the skills that Anderson (2012) and Ashbaugh (2013) have identified that IDs need to be successful. Among these skills are relationship building (Anderson, 2012), communication (Anderson, 2012), collaboration (Ashbaugh, 2013), strategy formulation (Ashbaugh, 2013), and visioning (Ashbaugh, 2013). The ability of IDs to apply these skills enables them to continuously engage in personal and professional transformation (Campbell et al., 2015). The process takes shape through IDs' conversations with others, including other colleagues and faculty, rooted in the IDs' expertise and experience in the field, as well as in the IDs' own personal and professional values. In the context of cultural and collaborative learning within organizations, these conversations have the potential to transform educational institutions through faculty-client relationships. Ultimately, ID is a conversation that is grounded in reflexivity, voice, objectivity, and authority. Leaders need to first hear from IDs who can communicate a clear vision for their role and how they should be prepared for it. According to Brigance (2011), IDs are in a position to share their vision for the future of education with faculty and administrators. However, they have to first claim this vision, communicate it to others, and act on it. Those are all important leadership activities.

Significance of the Study

The study of ID challenges and leadership development to meet those challenges is important because of the centrality of the ID experience to the lives of colleges in today's high-tech environment. Moreover, the growth of distance education has led colleges to invest more in designing and delivering education online (Bawa & Watson, 2017). This is one of the main intersections of IDs and colleges today. More specific to IDs, however, are the similarities between their roles and roles traditionally held by leaders. Like leaders at all levels, IDs' credibility is central to their ability to influence faculty toward the creation of high-quality courses (Anderson, 2012; Haslam et al., 2011).

There is a substantial body of research documenting the challenges that IDs face in building and maintaining credibility, keeping their technical skills up to date, and managing conflict, all of which directly impacts their ability to fulfill their responsibilities (Anderson, 2012; Gerin-Lajoie, 2015; Patry et al., 2015; Pan & Thompson, 2009; Sharif & Cho, 2015; Summers et al., 2002). However, there is not much research on the specific experiences that IDs have in preparing for these challenges. This study will add to the scholarly literature by presenting a picture of the leadership context and development landscape for IDs.

Another reason for IDs to take leadership of course design is that course design is driven by context. The nature of design itself means that effective design is unlikely to derive from a purely process-oriented approach. Rather, it involves IDs solving problems by synthesizing materials and may involve creative collaboration with other members of a design team (Tripp & Bichelmeyer, 1990). Moreover, design problems are non-

hierarchical, and often involve creating interim solutions that need to be revisited and revised or even scrapped later (Tripp & Bichelmeyer, 1990). Therefore, it is the nature of design that it leads to the discovery of new goals that must be incorporated into the final design and which may influence vision. Effectively aligning new goals with vision and guiding a team to the fulfillment of those goals, while balancing competing interests, conflicting information, and resource challenges lies at the heart of leadership. Since IDs are at the center of this activity, good leadership skills are essential for their success.

Summary

IDs fill an important role in higher education. They are at the center of collaboration on course development in many institutions of higher education. The skills that they apply in fulfilling this role are complex and need to be developed through formal training and professional development. This study will help leaders better understand the skills that IDs use and the challenges that IDs face in putting these skills to use. IDs who do not share a vision and create buy-in for their vision may find themselves without effective influence over course design. Since course design is their main role, having influence over the design team is important to their professional lives.

CHAPTER TWO: LITERATURE REVIEW

Introduction

IDs often have the responsibility of working within design teams in various

settings, including government, industry, and higher education. Creating effective

designs can include collaboration between IDs and other members of the design team.

IDs often have the responsibility of leading collaboration with faculty, other members of

the design team, and administrators.

This study focused on IDs working in higher education. In this type of setting,

IDs usually worked with faculty in developing online courses. They also worked with

other stakeholders, including creative designers, video producers, and others. Leading

collaboration between these stakeholders often falls to IDs. This study examined this ID

role to determine how IDs experience the phenomenon of leadership in higher education

course design. The following pages present relevant literature on course design,

collaboration, and leadership, as well as IDs' perceived need for development related to

this type of leadership.

Literature about the Professional Practice Field or Topic

IDs often perform the much-needed task of determining instructional needs for

curricula that are developed by university staff and faculty in institutions of higher

education (Sharif & Cho, 2015). To accomplish this task, IDs need a varied skill set that

includes both technical and soft skills (Gerin-Lajoie, 2015; Summers et al., 2002). The

technical skills entail translating learning objectives and content into instructional

interactions that are meaningful to learners, imparting the necessary knowledge or skills,

and effectively assessing learning. The soft skills IDs need are those that enable

communication and relationship building between them and faculty or SMEs. Acquiring, improving, and maintaining these skillsets can be a challenge for IDs for a variety of reasons. First, the focus of most ID degree programs is not on the soft skills necessary for leadership (Anderson, 2012). The lack of an academic background emphasizing the importance of leadership skills puts IDs at a disadvantage in acquiring those skills. Also, a lack of mentorship from IDs with experience in collaboration leaves less experienced IDs with few examples to follow (Sharif & Cho, 2015).

Leadership skills are important for IDs if they are to create the collaborative environments that are needed to engage with faculty (Anderson, 2012; Ashbaugh, 2013). There are various ways in which IDs can gain the leadership skills they need to stay current in the field. Formal learning, in which learning activities are part of a predesigned curriculum, is one way. However, the ever-changing nature of the field of ID, along with individual needs of IDs working on diverse programs requires a more flexible approach to leadership development for IDs (Sharif & Cho, 2015).

IDs are also often required to manage ID projects. This requires skills in the five project management processes: initiating, planning, executing, monitoring, controlling, and closing projects. It also requires communication and leadership skills, which are typically not taught in degree programs for the academic preparation of IDs (Van Rooij, 2010). The lack of effective leadership preparation for IDs can have a negative impact on IDs' ability to lead collaboration on ID projects.

Literature about the Professional Practice Setting

The field of ID is always changing. The rapid advance of educational technologies is but one challenge that IDs face in staying current in this field. Competing

ID models and the need to keep course designs fresh to appeal to new audiences require

IDs who can think logically and creatively, act deliberately and precisely, and defend

their proposals and projects. However, professional development for IDs usually does

not include training and education on skills that promote this skillset. Much of the

knowledge that would help novice IDs develop these skills is presumed, with learning

opportunities in these areas spread amongst other fields of instruction or held as simple

mastered knowledge or wisdom in the minds of senior experienced designers.

ID itself is a practice that is based upon community (Campbell et al., 2015). IDs

who work in close proximity to each other often work together on projects and share

experiences. Within the ID profession, there are multiple channels of communication.

For example, there are online blogs and discussion boards in which IDs can ask for

information and share experiences. (See, for example, the list of recommended ID blogs

created by Designing Digitally [2018]). Lacking in these, however, is a sense of

consistency and connectedness. It can also be difficult for some technical or pedagogical

queries and the corresponding advice to get the attention they need. A more deliberate

approach in which experienced IDs take the lead is needed (Anderson, 2012). IDs also

tend to work in very collaborative environments and much that IDs know they have

learned from other IDs who have shared their experiences. Sharing these experiences

between IDs helps deepen reflection and learning for all (Campbell et al., 2015).   Sharif

and Cho (2015) conducted a study of ID practice and found that some of the greatest

challenges facing IDs are the variety of skills needed to perform the varied tasks of IDs,

the lack of consistency in expectations placed on IDs, and the level of ambiguity involved

in design work. Along with the challenges of heavy workloads, the number of design

models, and the fast pace of technological advancement make it difficult to create

standardized training for IDs. These researchers recommended the establishment of

communities to link IDs from various backgrounds and experience levels with each other

to work through professional development issues. It may be worth trying a similar

approach for leadership development.

According to Pan and Thompson (2009), IDs need to develop a mixed repertoire

of skills and knowledge of tasks and processes that enable their work. IDs also need to

understand how project requests and requirements will impact the project and the rest of

the design team. IDs need to be assertive and be able to insist on design principles that

they have learned through experience and training (Ashbaugh, 2013). Moreover, IDs

need to make decisions and think critically about the design approaches to use based

upon the learning goals and trade-offs that are inherent in any design model (Baum &

Newbill, 2010). Balancing these interests can be challenging (Honebein & Honebein,

2015). Designing instruction requires the participation of several stakeholders. There are

a variety of tasks that must be completed in a timely manner, and in a specific sequence.

Regular communication between stakeholders is essential (Patry et al., 2015).

Theories of Collaboration and Design Context

There is no single theory of collaboration that can explain the phenomenon of

collaborative engagement (Wood & Gray, 1991). Collaboration involves complex human

interactions. It is deeply rooted in social psychology, as is leadership itself. Issues such

as power dynamics, trust, commitment, and achieving a shared understanding are

paramount in collaboration (Katz & Miller, 2013).

Within the context of course design, the interactions between IDs and others often involve making compromises to achieve results that support learning while also taking into account other constraints and requirements. These constraints and requirements can come from sources such as marketing departments, accreditors, project managers, and others not directly involved in the collaboration. Nevertheless, they impact the dynamics of the collaboration and become part of the context within which the collaboration takes place.

Leadership for IDs

Leadership happens at an interpersonal level. This is also the level at with collaboration happens on design teams. Collaboration on course design requires communication and trust to arrive at a shared vision for the design based upon the educational goals for the design. This vision generally develops over time while the design team works toward achieving goals (Tripp & Bichelmeyer, 1990).

Interpersonal leadership within the context of the ID experience can take different forms depending upon the specific context. For example, faculty that have more experience with online teaching and learning may have a more fully formed vision for the course than those who do not have this experience. ID leadership in such cases may be more transactional, meaning that the ID role may be mostly to lead the faculty through the process steps to bring their vision to life. On the other hand, faculty who are new to online teaching and learning may have more difficulty forming and implementing a vision. In all contexts, building trust is the key. Learning more about IDs' experiences with trust-building is critical to understanding relationships between IDs and SMEs.

Communities of Practice (CoP)

One idea for getting this knowledge into the hands of novice designers is the formation of ID CoP (Sharif & Cho, 2015). The problem lies in determining the most effective ways to form, maintain, and support these CoP. Leaders in the field need to find ways to nurture CoP to promote competency in the field and provide institutions of higher education with confidence that IDs are up to the modern challenges that IDs face.

Building effective CoP may itself be a way to provide the opportunity for practicing collaboration and trust-building (Van Rensburg et al., 2016). The coordination and interpersonal communication that is required to organize, plan, and maintain a CoP could itself be helpful in building leadership skills (Oliver & Watson, 2017). Moreover, if the CoP include faculty and SMEs, there could be an opportunity to establish more collegial contacts between IDs and these stakeholders and improve the collective wisdom and cognition of all involved (Gibson, 2001; Gunawardena et al., 2006; Wenger et al., 2002).

Leadership Literature

There are many conceptual theories and notions about the qualities and behaviors that make a leader a leader. Haslam et al. (2011) described several of these ideas, including the great man theory and associated theories that rely solely on a leader's charisma or personal attributes to explain the leader's success. They conclude, however, that leadership is much more than that. True leaders are those who their followers see as archetypes for the groups or organizations they lead.

Leading without Formal Authority

There are different sources of power that leaders can use to influence others. Perhaps the most well-known is positional power. This is the power that comes from the formal authority that a leader can have over others because of their position within an organization (Haslam et al., 2011). However, IDs rarely have positional power over others on a design team. The power that IDs have comes from expert power, rather than from positional power. According to Rogers (2003), expert power is the influence that comes from expertise in a particular field.

The need for the leadership development of IDs is great. The field of ID is very dynamic. The variety of ID models, rapidly advancing technology, and the variety of the subject matter with which IDs work mean that preparing IDs for entering the field is a challenge (Sharif & Cho, 2015). Likewise, the lack of consistency of roles and job descriptions among IDs means that there is no one set of skills and attributes that IDs need to be successful (Sharif & Cho, 2015). All of these features of the discipline create a challenge in preparing new IDs for the field and contribute to the fact that IDs seldom get formal training and education on the skills they need to be successful in the field (Anderson, 2012). However, informal learning is also important for IDs.

Informal learning can take on different meanings in different situations and even in different fields. Yanchar and Hawdley (2014) defined informal learning as "facets of professional development that do not include formal course structures and curricula" (p. 272). This is a general definition that might work for many fields. Cheong et al. (2006) wrote that informal learning consists of self-study undertaken by IDs based upon their

perceptions of their own needs. Both of these definitions served as the basis of informal

learning for this study.

Leader/Follower Plasticity and Adaptive Leadership

Leader/follower plasticity refers to the need to alternate between leader and

follower roles. IDs in the sample indicated that switching between these roles is

something that they do frequently. This plasticity is common for collaborative groups

who coordinate tasks in real-time and can be initiated and recognized through social cues

or be related to the specific tasks the group is accomplishing (Nakayama et al., 2017).

The field of education is beset by complex problems. These relate not only to

education on a grand scale but also to individual problems that have a lot of possible

answers to which individuals bring different perspectives. This context applies to the

work of IDs as well. For example, there are competing theories regarding how people

learn. Each of these theories may have many proponents in any given higher education

institution. IDs may be pulled in different directions by these proponents. These factors

can complicate the work of IDs and lead to conflicts within design teams. Leading teams

through this complication can be difficult and may require an adaptive approach.

The adaptive leadership model offers a way to lead through these challenges by

focusing on collaborative problem solving and weighing multiple perspectives (Nelson &

Squires, 2017). While the model was devised for large organizations to apply to complex

organizational problems (Heifetz et al., 2009), the practice of adaptive leadership may

help with smaller subsets of problems that organizations face. Since delivering effective

educational experiences is a key goal of colleges and universities, applying adaptive

leadership to smaller problems impacting that goal may prove beneficial.

Reflections of the Researcher

ID is a challenging field in the realm of organizational structure and interprofessional collaboration. The interpersonal "team" challenges involved in leading collaborations are particularly difficult to overcome. IDs who have deep knowledge of learning and teaching, along with an ability to find solutions to instructional problems, tend to be the most successful.

Building trust is key to establishing and maintaining relationships with faculty. However, much of the training IDs receive is focused on the use of technology and incorporating it into teaching and learning. This sort of training is important, but it is insufficient as a skillset in the absence of leadership training. This study has helped to elucidate those ID experiences in building trusting relationships with faculty.

Summary

ID is a demanding field that requires the ability to lead collaboration in a creative and participatory environment. The ability to lead collaboration requires specific skills that need to be developed along with the skills required for other ID tasks. Skills in communication and relationship building are just as important to IDs' success as are technical skills related to course design.

IDs seldom have formal authority within design teams. Nevertheless, there are sources of power they can tap into to create influence. For IDs, the most common source of power is expert power, which comes from their knowledge of design. However, even if IDs tap into this power, there is no guarantee that they will wield it successfully to encourage teams to help accomplish goals. IDs need to develop their leadership skillsets to be effective at leading teams.

CHAPTER THREE: METHODOLOGY

Introduction

This study employed phenomenology with thematic analysis to understand the IDs' experiences as they saw them. Phenomenology is both a philosophy and a research method (Lin, 2013). As a philosophy, it is concerned with human consciousness, and how people make sense of their own experiences (Moustakas, 1994). As a methodology, phenomenology focuses on revealing the meanings of human experiences in the minds of the research participants (Sanders, 1982). This approach matched well with the research question for this study, which required describing and analyzing IDs' own experiences.

The researcher considered several factors in determining a research approach. Among them were the assumptions of the researcher, the research design, and the methods of data collection, analysis, and interpretation (Creswell & Creswell, 2018). There are two broad approaches researchers can use to conduct research. One is quantitative and the other is qualitative.

Quantitative research generates numerical data to test a hypothesis. A hypothesis is an expression of an assumed relationship between two or more variables. Quantitative research results in conclusions that can be inferred or generalized to the population under study (Bloomfield & Fisher, 2019). Despite the value of being able to apply conclusions to larger populations, quantitative research does have its drawbacks. For example, quantitative research by itself does not give us insight into how people view their experiences or the meaning they take from them (Skea, 2016).

Keeping in mind that answering the research question for this study required describing the lived experiences of IDs, the researcher turned to qualitative approaches.

There are several such approaches to choose from. They include case studies,

ethnographies, grounded theory, narratives, and phenomenology. The main similarity

between each qualitative approach is that they all involve inductive analysis of data

collected from participants (Creswell & Creswell, 2018). They differ mainly in terms of

the types of data collected and the philosophical approach of the researcher.

The method and phenomenological methods are similar in that both forms

are interested in the experiences of participants. However, there are important

distinctions between them. Narrative research has an epistemological focus while

phenomenology has an ontological focus (Lindsay, 2006). The lived experiences of the

participants form the basis of epistemological research. Ontology denotes actual

knowledge, while epistemology denotes knowledge as perceived by people. It is the

perceptions IDs have of their own experiences that make them insightful and meaningful

for this study, making phenomenology the preferred methodology.

The method was designed to gather data from participants through semi-

structured interviews. The researcher did employ an interview protocol designed to get

participants talking about their experiences on ID teams. However, the researcher

allowed the participants to talk about their own experiences as they saw them. This

allowed the data to flow from the participants themselves.

This study made no attempt to generalize the findings to the larger population.

Transferability may be possible to similar settings. This would allow others to determine

if the conclusions might be true for populations in which they are interested.

Generalizability may be possible to the extent that the experiences and contexts that

different IDs work under are similar. However, given the different values and roles that

individuals work under, generalizability will probably not be realized (Henriques, 2014).

Since this is a phenomenological study, the conclusion describes the essence of the

specific phenomenon in question, in the context in which it occurs (Creswell, 2013).

Broadly speaking, a participant can be anyone who has experienced the phenomenon

(Groenewald, 2004). In this case, the central phenomenon is working as an ID in higher

education.

Data Collection

The participants all had experience designing courses as members of ID teams in

higher education. All also reported similar leader and follower roles within their teams.

The data sources for this study were in-depth phenomenologically based interviews. The

interviews were conducted both in-person and via web conferencing, utilizing Zoom™.

All interviews were recorded and transcribed using Rev.Com^{TM}, an online transcription

service that charges a per-minute rate for accurate human-generated transcriptions (Rev,

2018).

Collection Method

The data was collected through in-depth one-on-one interviews with the

participants. The interviews began with an overview of the research, including the

purpose for it, and that the researcher's intent was to hear from the participants their own

experiences as IDs working on ID teams. The participants were informed that their

information would be kept completely confidential, that the interviews would be recorded

and transcribed, and that they could withdraw from the interview at any time. The

researcher asked questions from the interview protocol as conversation starters. The

research question is different from the interview questions because phenomenological

researchers want the data to emerge from the informants' own experiences (Groenewald, 2004). The researcher asked probing questions and allowed the discussion to go deeper into ID practice.

Instruments for Data Collection

Data collection consisted of one-on-one interviews between the researcher and participants. This section highlights general topics and associated research questions. There are no right or wrong answers to any of these questions. Also, the interviews were not limited to these questions. The questions were designed to stimulate the IDs to talk about their own backgrounds, experiences, and attitudes regarding ID leadership.

Subtopic 1: Background Information

The following questions were meant to assess the educational background of IDs and how well IDs thought their backgrounds had prepared them for their roles as IDs. This information helped to shed light on the value IDs placed on their formal education and training. This included education and training that is specifically directed at leadership development.

Q1: Describe your formal post-secondary education and training, whether or not it relates directly to your role as an ID.

Q2: How relevant to your role as an ID do you think this education and training has been?

Q2a (Probe): Why do you think it had relevance (or lacked relevance)?

Q3: How do you keep current with advances in the field?

Q4: What training (either formal or informal) do you have in leadership?

Subtopic 2: Design practices

These questions were designed to learn more about the design practices of IDs. The questions were asked because it was important to know how IDs themselves understood design and to compare that to the literature on design. Additionally, learning more about how IDs interacted with SMEs shed light on leadership skills they already used, and how effective they believed they were at leading SMEs and development teams toward a shared vision and goals.

Q1: Describe your process for designing courses.

Q2: Describe your typical interactions with SMEs.

Q3: Describe any challenges you may have had with formulating and communicating goals and a vision for course designs.

Q3a (Probe): How did you address those challenges?

Subtopic 3: Thoughts on Leadership as Part of the ID Role

These questions were designed to learn more about participants' thoughts and attitudes toward leadership on development projects.

Q1: Describe what "ID leadership" means to you.

Q2: What are the ways you think you demonstrate leadership on course design and development projects?

Q3: How comfortable are you with taking a leadership role on course design and development projects?

Q4: What aspects of the design process (however you implement it) should IDs take leadership over?

Subtopic 4: Building Trust

Building trust with constituents in the design process is key to effective collaboration. These questions were focused on teasing out IDs' experiences in building trust with faculty and SMEs. Building trust is a complex interpersonal process and different IDs may approach it differently, with varying results.

Q1: Describe the level of trust you have experienced between yourself and faculty or SMEs.

Q2: Describe the barriers you have experienced in building trust with faculty or SMEs.

Subtopic 5: Past Leadership Development Experiences

The following questions were meant to gather basic information on the subjects' past experiences with leadership development. This information was important as background in determining the subjects' interest in leadership development, as well as their perceived need for leadership development.

Q1: Describe your past leadership development experiences.

Q1a (Probe): If you have not had any leadership development experiences, can you explain why you have not had any?

Q2: What kinds of needs have you used leadership development to address in the past?

Subtopic 6: Effectiveness of Leadership Development Experiences

These questions were meant to allow the subjects to describe the perceived effectiveness of their past leadership development experiences.

Q1: How effective do you think these experiences have been for you?

Q1a (Probe): If your experiences have been effective overall, why do you

think that is?

Q1b (Probe): If your experiences have not been effective overall, why do

you think that is?

Q2: What factors do you think contribute most to the effectiveness of leadership

development for you?

Subtopic 7: Current Leadership Development Needs

Ascertaining the subjects' leadership development needs and perceived constraints

in meeting those needs was the purpose of this line of questioning. Here again, there

were common themes regarding the subjects' needs and challenges.

Q1: What are your greatest leadership development needs?

Q1a (Probe): How do you intend to meet these needs?

Q2: What constraints exist in meeting your current leadership development

needs?

Q2a (Probe): How do you intend to address these constraints?

Subtopic 8: Anticipated Future Leadership Development Needs

In this subtopic, the goal was to determine common themes regarding anticipated

future needs. By this time, the subjects were comfortable with talking about the

leadership development challenges and opportunities before them. These questions

helped to determine future needs of which leaders may need to be aware. They also

inspired the subjects to think more deeply and critically about their own needs.

Q1: What do you perceive to be your greatest future leadership development

needs?

Q1a (Probe): How do you intend to meet these needs?

Q2: What constraints exist in meeting your future leadership development needs?

Q2a (Probe): How do you intend to address these constraints?

Subtopic 9: Methods of Identifying Leadership Development Needs

The questions in this subtopic asked about how the subjects identified their needs. The themes helped to uncover the challenges subjects faced in identifying their needs. They also revealed some thoughtful and considered approaches to needs analysis.

Q1: How do you identify your leadership development needs?

Q1a (Probe): If someone else determines your leadership development needs, who are they and how do they identify those needs?

Q2: How has your method of identifying leadership development needs been working for you?

Q3: What changes are you planning on making to your method of identifying your leadership development needs?

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Recruiting Participants for the Study

</div>

The researcher began with a convenience sample of IDs who all worked at the same midwestern university. Recruitment of the sample began with the researcher sending the participant information letter and an invitation to join the study via email to all of the IDs known to him at the university. This resulted in a sample of nine IDs, to begin with. The researcher also employed snowball sampling to increase the sample size. This is a sampling methodology, described by Babbie (2017), in which participants were asked if they knew of anyone else who has experienced the phenomenon and might also be interested in being included in the study. The researcher also posted the participant

information letter, along with an invitation to join the study to an ID interest group on

LinkedIn. These activities proved to be a good way to grow the sample size, as well as

increase the diversity of the sample itself. The study is based upon a sample of 15 IDs

who had experienced the phenomenon under study.

The messaging to the LinkedIn group followed the procedures described by

Linder and Dello Stritto (2017). Those researchers sent recruitment invitations to IDs

that belonged to groups such as the Online Learning Consortium and EDUCAUSE. The

initial invitations were followed by reminders. Overall, recruitment for the Linder and

Dello Stritto (2017) study occurred over a period of four months and netted a sample of

311 IDs.

Recruitment for this study occurred in late August and early September of 2019.

Interviews began in early September and concluded in late September. The convenience

sample resulted in a larger number of IDs from one organization. The other recruitment

activities resulted in an almost equal number of participants from several different higher

education institutions. All participants were geographically located either in the

midwestern or eastern United States. Recruitment itself was not limited to those areas,

however.

Phenomenological studies usually have a sample size of 5-25 individuals who have

experienced the phenomenon (Creswell, 2013). Crouch and McKenzie (2006) wrote that

15 to 20 participants is an ideal sample size for most qualitative research, as it is a large

enough sample to penetrate the phenomenon, but small enough to maintain close

relationships with participants to promote openness in discussing participants'

experiences. Guest et al. (2020) added that saturation is usually possible with as few as 11-12 interviews with a homogenous sample.

Most of the participants reported that their job title was "Instructional Designer." One was a "Senior Instructional Designer." Another reported their job title was "Instructional Support Specialist." All reported that their job descriptions included roles and responsibilities consistent with this study's working definition of "instructional designer." One of the participants also had experience as a faculty member who had taught ID courses. The participants ranged in years of experience from less than one year, to over 20 years as an ID in higher education or in an organization that serves higher education. Collectively, the participants represented over 95 years of ID experience. The ages of the participants ranged from the early 20s to late 60s. One participant did not provide their age. See Table 1 for a representation of the participant demographics.

Table 1

Participant Demographics

Participant	Job Title and Experience	Age Range	Prior Career	Highest Education (Fields)
1	ID 3 months	30-40	Teacher	PhD, English Literature and Theory
2	ID 5 years	40-50	Corporate Trainer	MS, Project management; MS, Leadership

Participant	Job Title and Experience	Age Range	Prior Career	Highest Education (Fields)
3	ID 2 years	30-40	Teacher	MS, Instructional Design
4	ID 4 years	40-50	Training and Development	MA, Higher Education and Organizational Development
5	ID 4 years	40-50	Teacher	MA, Design MS, Education
6	ID 9 years	50-60	Military	MS, Instructional Design and Development
7	ID 8 years	30-40	Retail	MS, Family Consumer Science
8	ID 16 years	40-50	Teacher	MS, Instructional Design
9	ID 6 years	Not reported	Teacher	MS, Education
10	ID 1 year	20-30	Student	BS, Professional Writing
11	Senior ID 20 years	50-60	Television	MA, Technology and Education

Participant	Job Title and Experience	Age Range	Prior Career	Highest Education (Fields)
12	ID 2 years	50-60	Teacher	MS, Learning Design and Technology
13	ID 6 years	60-70	Quality Control	MS, Leadership
14	ID 7 years	30-40	Education	PhD, Medieval and Modern Languages
15	Instructional Support Specialist 5 years	30-40	Technology Support Specialist	MS, Instructional Design MA, Theater Production and Stage Management

All participants in the study were individuals who were working as IDs employed either directly by colleges and universities (14 of the participants fell into this category), or by private companies who are contracted by colleges and universities to design and develop college courses (one participant fell into this category). The majority of the participants worked for private, not-for-profit colleges or universities that offered 4-year degrees or higher. Regardless of their employer, all participants reported that they work directly with higher education faculty and staff in the design and development of college courses. In all, the participants represented seven different institutions. See Table 2 for a breakdown of the employer types represented by the participants.

Table 2

Participants' Employers

Classification	Number of Different Institutions	Number of Participants
College or university 4-year or above Private, not-for-profit	4	12
College or university 4-year or above Public	1	1
College or university 4-year or above Private, for-profit	1	1
Educational service provider Publicly traded company	1	1

Procedures

The organization of the subtopics and questions moved the interview from the participants' past experiences with leadership development to current needs, and then to future needs. It also focused on the role of leadership and followership within those experiences. This organization allowed the subjects to begin by discussing the topic from

a vantage point that was very familiar to them. This may have helped the subjects feel more comfortable about the topic before beginning to critique their own roles, examine their own experiences, and even anticipate future needs.

The researcher also incorporated procedures followed by Bawa and Watson (2017), who began with semi-structured interviews to gain stakeholders' initial insights on a process and their perceptions of how the process worked. In the case of the current research, the focus of the study was on the lived experiences of IDs. Based on the results of the initial questions, the interviews gravitated toward an exchange of perspectives. Bawa and Watson (2017) observed that this procedure allowed the interviews to become written records "taken from the pages of life of the researcher and the researched" (p. 2339).

The majority of the interviews took about an hour to complete. The shortest one was 38 minutes. The longest one was 90 minutes. Many variables, such as an individuals' experience in the field, amount of leadership development, and openness to discussing their experiences likely contributed to the length of the interviews.

All of the audio recordings, transcripts, field notes, and other artifacts were stored in multiple secure locations. This helped to ensure that no data was lost in case any one of the storage methods failed. One of the drawbacks of this method was that it also increased the chances of a data breach. Therefore, extra precautions were taken to preserve participants' privacy and confidentiality. These included:

- Not associating any names with the written or recorded records.

- Storing interview notes in a secure location.

- Storing recorded interviews and interview transcripts in password-
  protected cloud-based storage and in password-protected folders on a hard
  drive.

Ensuring participants' privacy and confidentiality included eliminating any identifying information from the recordings, transcripts, codes, and the report. Each interview was assigned a code, as recommended by Groenewald (2004), to identify the informant without providing personally identifiable information (for example, "Informant 20190910-1"). The same code was used to identify all artifacts associated with the interview, to include the audio recording of the interview, the transcript of the interview, and the field notes associated with the interview. The field notes themselves included observational notes, theoretical notes, methodological notes, and analytical memos that the researcher thought might be helpful during coding and analysis, as recommended by Groenewald (2004).

Data Analysis

The researcher applied thematic analysis (TA) due to its flexibility (Nowell, et al., 2017) and usefulness in examining the different perspectives of the research participants (King, 2004). The researcher applied a six-phase TA process as described by Braun and Clarke (2006):

Phase 1: Familiarization

Phase 2: Generating initial codes

Phase 3: Searching for themes

Phase 4: Reviewing themes

Phase 5: Defining and naming themes

Phase 6: Producing the report

Each of the phases built upon the previous phase, but the process was also recursive since it allowed the researcher to move back and forth between each phase as needed (Braun & Clarke, 2006).

In the familiarization phase (Phase 1), the researcher read and re-read the transcripts and interview notes to get a good overview of the data that had been collected. The researcher also listened to the recorded audio while reading through the transcripts to confirm their accuracy. The fact that the researcher was present for each of the interviews aided in the familiarization stage. This stage may take on even greater importance when persons other than the researcher are conducting the interviews (Braun & Clarke, 2006).

During Phase 2, generating initial codes, the researcher began making a list of initial codes based upon the data. The researcher worked slowly and systematically through the data, creating a list of codes in Dedoose coding software. This software allowed the researcher to tag, color code, and name each data extract. The researcher followed Braun and Clarke's (2006) advice to code for as many themes as possible, since researchers do not know what might prove to be interesting later. This phase generated 17 codes and 227 coded excerpts.

Phase 3, generating initial themes is where the researcher began to organize the codes into themes. Themes were created from codes that seemed to be related to form "overarching themes" (Braun & Clarke, 2006, p. 89). It is the themes that created the basic unit of analysis in this phenomenological study. This phase resulted in an initial set of eight overarching themes.

In Phase 4, the researcher reviewed the set of initial themes. The themes were viewed against two criteria, as described by Patton (1990): internal homogeneity (data within themes adhere meaningfully), and external homogeneity (there are clear and identifiable distinctions between themes). This phase resulted in one theme being thrown out for lack of data to support it. The remaining seven themes were brought into the next phase of analysis.

Defining and naming themes was the focus for Phase 5. The researcher conducted a detailed analysis of each of the themes. Following the advice of Braun and Clarke (2006), the researcher considered the "story" that each of the themes told, as well as how it fit "the broader overall 'story'" of the data (p. 92). This analysis continued until the researcher was able to identify clearly what each theme was and was not. This was aided by writing concise descriptions for each theme and subtheme (Braun & Clarke, 2006). Figure 1 shows the final thematic map.

Figure 1

Final Thematic Map Showing Main Themes and Subthemes.
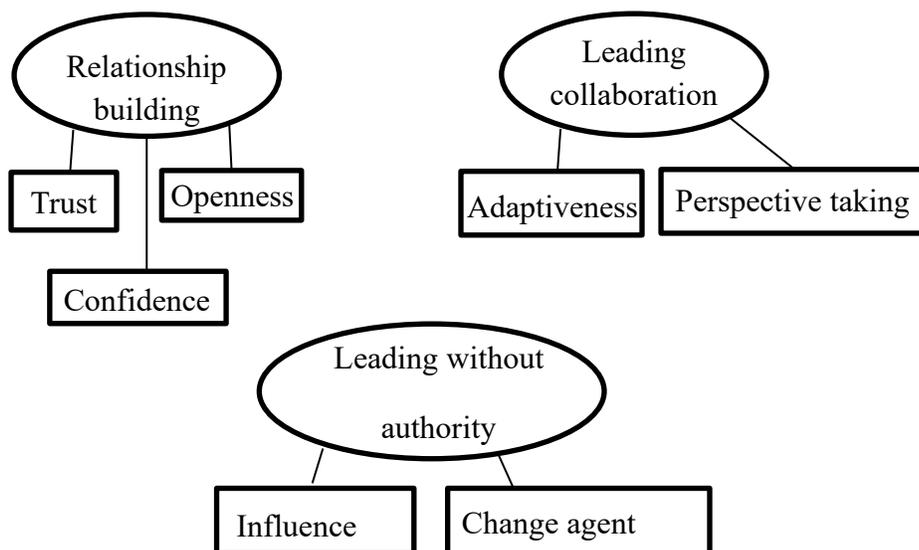
Phase 6 began after the final themes had been set. The task for the researcher in this phase was to convey to readers the complicated "story" of the data in a way that portrayed the merit and validity of the analysis. It was important in this phase to provide an account of the data as it related to each theme, with data extracts that provided evidence for each of them. The findings are included in Chapter Four of this paper.

Leadership Roles/Implications Related to Data Collection

The leadership issues involved centered around individual IDs' specific roles within their organizations. However, some researchers (e.g., Anderson, 2012, and Brigance, 2011) believe that IDs need to exert a leadership role on development teams, but that they are generally poorly equipped for this role. This study intended to understand IDs' individual perceptions of their roles as leaders, and whether they felt they were prepared for those roles. The data collection was focused on learning from IDs about how they view themselves within their organizations.

Ethical Considerations

The primary ethical considerations involved ensuring that participants properly consented, protecting participants' confidentiality, and protecting participants' identities. Ensuring informed consent was achieved by informing participants of the nature of the study, by assuring them that they were free to withdraw from the study at any time, and by assuring them that their identities would be protected. Protecting the participants' identities and ensuring confidentiality was achieved through eliminating identifying information on recordings, transcripts, and field notes. This research project did gain approval for exempt status by the Institutional Review Board (IRB). See the appendix for a copy of the IRB approval letter.

Summary

The goal of the research was to gain a greater understanding of IDs' perception of their role as leaders, and with how much trepidation they approach that role. The study relied on a phenomenological methodology in order to understand the lived experiences of IDs, including their fears and hopes for an increased role as collaborative leaders. In the end, the researcher hopes that the study will help to inform ID practice by incorporating learning from the study to better define ID roles, provide guidance on creating meaningful relationships between faculty and IDs, and to help leaders better prepare IDs for the common challenges in the field.

CHAPTER FOUR: FINDINGS

Introduction

This study was undertaken to answer the question: What are the lived experiences of IDs working in higher education in leading course design and development teams and in leadership development? The goal of the study was to empirically derive the nature of leadership as experienced by IDs themselves. The context within which IDs work is particularly important for understanding how IDs experience leadership. Understanding who IDs believe they are leading, how effective they believe they are as leaders, and how they believe they might improve would provide valuable insights for IDs and university administrators.

The interviews showed that IDs do view themselves as both leaders and followers. They do, however, sometimes struggle with knowing when and how to switch between these roles. They view building relationships with faculty as key to their influence. They also understand that their own expertise in the use of educational technology, course design, and project management are keys to success, not only for themselves but also for design teams as a whole.

Presentation of the Findings

Three main themes, each with subthemes emerged from this study. They are presented below. Relevant quotes from participants are provided to help illustrate the importance of each theme from the participants' perspectives.

Theme 1: Relationship building as a leadership tool

Subtheme A: Trust is a key to building strong relationships

IDs recognize building a trusting relationship with faculty is key to their

leadership experience. As expressed by one ID, the deeper and more personal the trust

the better:

> I think the role of trust is foundational. I mentioned earlier about finding that one
>
> of the resistance points to faculty members integrating more technology or
>
> changing their methodology is fear of embarrassment, and if the faculty member
>
> can't trust the ID in a way that's not even professional trust, but more of the
>
> personal trust that they can share, they can be open, they can be honest, I don't
>
> think you'll overcome those fears.

IDs recognize that building trusting relationships is key to building credibility: "I

think personal relationships give you credibility and they give you an inroad into really

helping people to change." IDs can also struggle with building trust. A lack of "time to

build that sufficient trust" was a problem identified by many of the IDs. IDs have their

own fears about being able to form effective relationships with faculty. IDs expressed a

lot of anxiety around timelines, process changes, and interpersonal problems.

"Missed deadlines erode trust," for example. Nevertheless, understanding good design

guidelines, providing encouragement, managing the design process, and being

professional and non-emotional can help IDs to be a "calming presence."

Subtheme B: Confidence is a key to maintaining trust

IDs understand that trust can be easily lost. Being knowledgeable can help

maintain trust, as put by one ID: "I think it's in that role of talking about pedagogy and

talking about activities and what works. I think that's when you can gain their

confidence." Being authentic and dropping pretense can also help maintain trust. One ID

put it this way, for example: "If you're throwing around terms incorrectly, or if you're

pretentious in trying to gain confidence you can actually erode confidence."

Subtheme C: Openness is a way to maintain trust

IDs often rely on openness and honesty as a way to maintain trust. ID work

involves a sharing of ideas as well procedures that are often referred to as "best practices"

regarding course design. This often is where IDs begin their collaborative efforts with

faculty:

I'll share what I think is a best practice, provide some alternatives, and also let

them know and understand that it's their call. I'm only making a suggestion or a

recommendation but it's up to them whether they want to accept or reject that.

So, it's always an open conversation. I establish that early.

Theme 2: Leading collaboration is a way to accomplish shared goals

Subtheme A: Adaptive leadership is necessary to encourage true collaboration while

staying focused on tasks

Collaboration requires an ability to adapt to changing requirements. The ability to

switch between leader and follower roles without losing their own identity is a common

part of IDs' leadership experience. Many IDs experience this as a natural part of their

role. The nature of design itself has phases in which IDs may need to take more of a

leadership role, as well as phases in which IDs need to follow more. In the words of one

of the IDs, "It's not something I guess I really think about because, I mean, there's just

very clear phases of a development project." Another ID put it very succinctly, saying,

"There are times to lead and times to follow."

Some IDs expressed frustration with the leader-follower labels, particularly as

they relate to collaborative leadership. One ID specifically said the labels "are blocky,"

meaning that the labels come with expectations that do not always reflect the IDs' roles

throughout the process. Some IDs also suggested that the signals they get from faculty

indicate that they are always expected to be followers and never leaders. One went far

enough to say, "Sometimes we're seen as second-class citizens within the university

setting because we're staff." However, most seemed to believe that they spent about an

equal amount of time in both leadership and followership activities. Moreover, they

believed that leadership and followership activities are "equal roles" in terms of

collaborative efforts. Particularly if other stakeholders are "indecisive," the ID may have

to take a leadership role more often during development. This does not necessarily mean

the ID is making "all of the decisions." However, it may result in the ID leading

collaborative efforts to make concrete decisions about the direction of the project. There

are also those times when a design may be veering away from a direction that has been

agreed upon, or toward one that may not comply with existing guidance. In those cases,

IDs may have to "bring the stakeholders back into compliance" with those guidelines or

agreements. IDs do see collaboration as an integral part of their own leadership

experience. They seem to believe that their collaborative efforts with faculty are

themselves a form of leadership. For example, one ID made this belief clear by saying,

"leadership is collaboration." Not all IDs seemed to embrace the leadership aspects of

the ID experience. For example, one said, "Yeah. We have the expertise to lead when we

need it, but I think we all prefer to follow."

Subtheme B: Perspective-taking is necessary for true collaboration

Acknowledging different perspectives is an important way IDs experience

leadership. IDs generally see themselves in a facilitating and consulting role with

faculty. This requires a great deal of listening:

> It's not that we don't inspire, but I feel like this role is a much more soft-spoken
>
> kind of role that involves a lot more listening. As the needs grow, you're going to
>
> get people with different points of view, different expertise, different
>
> backgrounds, and we can't expect everybody to know everything.

Theme 3: Learning to lead without authority is key to successful ID leadership

Subtheme A: Gaining influence through expert power is an effective strategy

IDs recognize that, even though they rarely have positional power, they can and

do exert a great deal of influence over faculty and other members of design teams. They

see their most important source of influence as expert power, with their expertise being in

course design principles, use of technology, and process knowledge. The excerpts below

demonstrate this experience among IDs:

> My influence is completely informal. I'm not in a formal position to tell anyone
>
> what to do. It's completely informal and I think it's received well because I'm able
>
> to speak from experience and as an expert. That's valued. I think they recognize
>
> that.
>
> When it comes to things that I know, where I'm a subject matter expert on, then I
>
> can lead on those areas and provide my insight, and expertise on that. Best

practices, things we've tried, things that have failed, things that have succeeded
very well.

I think my biggest area of expertise in a project is the actual development and
technology expertise required to build the course site. So, when I get all of the
content from the subject matter expert, that's when I feel the most influential.
The way I view my relationship with faculty is I'm more of the expert in
instructional design and I want to make you smarter, I just don't want to keep you
at the same level, I want you to move up and get more skills at this. Because
ultimately it makes my job a lot easier the better they get at doing what they have
to do.

IDs do also acknowledge that their expertise can be challenged, and they are often
on guard against that.   Common areas of concern for IDs where their expertise may falter
are new technologies and new processes that take time to master. When these things
occur IDs can be made to "look like we don't know what we're doing."

IDs can often be challenged on their "lack of teaching experience." Many
reported this as a common complaint of IDs by faculty. Most IDs in this study did have
teaching experience. Therefore, they felt this was an unfair criticism. However, some
IDs recognized a lack of teaching experience as a gap in their expertise and one which
faculty can be quick to point out. As one ID put it, "faculty often say we don't have
teaching experience, and it is a gap for some of us."

Subtheme B: IDs can be successful change agents

Many IDs see themselves as change agents, and that being a change agent does
not require positional power. "What I think is we're more change agents than leaders,"

said one ID, "we can lead faculty and administration to do things in new ways and adopt

innovations." Another acknowledged that leading change is difficult, but necessary:

"Being sympathetic to change and how some people resist change, and others accept it, I

think is important." Many relish this role as change agents, as one ID explained, "I kind

of want to change the faculty. If I identify a faculty who could use improvement, I want

to change them."

Analysis and Synthesis of Findings

IDs generally view themselves as experts in course design. This manifests itself

in different ways. However, most IDs tap into their process and technology expertise

when working with faculty. The leadership style of most IDs is very democratic and

collaborative. IDs realize that others ultimately have the final approval authority.

However, IDs use their expert power to influence how courses are designed. IDs are

often the most convenient source of information for faculty on processes and progress of

the overall project. This gives IDs a lot of discretion on how processes are implemented,

as well as when scheduling exceptions need to occur.

Though IDs do fill a leadership role, there are times when they need to follow.

Faculty and SMEs generally provide an overall picture of how they would like the course

to flow. They are often the sole experts on content. IDs need to be able to shift between

leader-follower roles without losing focus on the important role they perform in course

design efforts. Some IDs find the shift between roles easy, while others find it

challenging. There are also those who prefer one role over another. This can lead to

some substantial differences in the way IDs experience leadership on design projects.

Key challenges that IDs face in their leadership experience are adhering to timelines, competing visions for course designs, lack of experience with new technologies, and interpersonal conflict with faculty. These challenges are all in areas that are central to the leadership roles of IDs. The stress of these challenges can weigh heavily on IDs.

Summary

The lived experiences of IDs in leading design teams are varied and complex. IDs see their own role as leading certain activities of ID teams and following faculty and SMEs during others. The switching between roles is expected and accepted by IDs, but it can be uncomfortable for some, especially for those who prefer one role over another.

IDs tap into their process knowledge and design expertise as a source of influence on design teams. This expert power gives them the ability to influence design and process decisions during the entire course of a project. This influence can be eroded by challenges to IDs' expertise. These challenges can come in the form of missed deadlines, new technology that is difficult to learn, and changes to processes. Another common challenge is the fact that some IDs do not have teaching experience. This leaves them open to criticisms from faculty who do not believe IDs can really understand the designs that will work best for online teaching.

Resolving these challenges will require IDs to tap into the problem-solving skills they practice throughout their careers. It will also require them to learn from each other, take more control over processes, and learn from and support one another. They will also need to be good advocates for their expertise and for their roles on ID teams.

CHAPTER FIVE: CONCLUSIONS AND RECOMMENDATIONS

Introduction

This study was intended to contribute to the existing body of knowledge about ID leadership in post-secondary education by providing insights on how IDs may improve their general practices, effectiveness, and overall outcomes. Another aim of the study was to contribute to the literature on how IDs might be better prepared to lead collaborative ID teams. The need for the knowledge sought in this study is great, given the lack of leadership preparation nearly all IDs have received, either in their primary training or on the job. This chapter provides interpretations, reflections, and the researcher's conclusions regarding the study findings and recommendations for implementation.

Purpose of the Study

The purpose of this phenomenological study was to investigate the individual leadership experiences of IDs and to shed light on the challenges that IDs face now, as well as those they anticipate in the future.

Aim of the Study

The aim of the study was to provide ID leaders with recommendations on how to understand leadership from an ID's perspective and to improve leadership development experiences for IDs to help prepare IDs for current and future challenges.

Proposed Solution

The proposed solution needs to help IDs overcome the challenges identified from the data collected in the interviews. IDs will need to be supported in their process and technical knowledge, as well as in their knowledge of effective course design. It would

also be helpful for those who do not have teaching experience to gain that experience, or to at least have training in online teaching methods. Finally, finding ways to overcome stress and maintain calm when facing interpersonal issues, technical difficulties, process problems, and uncomfortable roles will also be essential.

Technology and Innovation

Technological change moves at a fast pace and IDs in this study indicated they are usually quite willing to incorporate new technologies into their practice. However, they must do so carefully and with clear intent as to the benefits they hope to achieve from incorporating new technologies. Given the central role of technology and innovation in ID practice, IDs can succumb to pro-innovation bias. Pro-innovation bias results when people assume that the results of innovation decisions will be desirable (Sveiby, 2017; Rogers, 2003). A critical analysis of every proposed innovation must be accomplished. IDs should be a part of that analysis. Those involved in this effort need to engage in reflection throughout the entire innovation process to determine if goals are being met. When new technologies are adopted, IDs should take a lead role in determining how and when they are used.

IDs as Change Agents

Include IDs in identifying and improving processes and implementing changes. Involving employees in innovation practices and process improvement can increase both productivity and worker satisfaction (Ramstad, 2014). This is especially important in ID work since the process models for ID often do not accurately reflect the true work of IDs (Tripp, & Bichelmeyer, 1990; Gordon & Zemke, 2000). Moreover, design is a complex, iterative process that requires customized decisions based upon the affordances and

constraints present in a particular project, or at a particular stage of design (Stefaniak &

Tracey, 2014). This will require some stakeholder flexibility. However, given the nature

of design, some process flexibility will help avoid frustration with processes that do not

quite match the reality associated with design projects. While not a focus of this study,

process flexibility may also appeal to faculty and other members of ID teams.

Throughout their practice, IDs work directly with faculty and encourage good

decisions about design that will support student success. This places IDs in a central role

directly related to the core mission of institutions of higher learning. In this role, IDs can

promote thinking critically and creatively about the use of technology. IDs may also

provide input on policies and processes that inform the use of technology and support

organizations that are able to adapt to change. According to Campbell et al. (2009), ID is

itself a socially constructed practice rather than a technical methodology. Socially

constructed practice may be best supported by socially constructed processes and

policies.

Sharing Experiences

ID is a field dominated by individual practitioners. Each will have their own

experiences. This study identified a variety of experiences among designers. Sharing

ideas between IDs within the same institution and across institutions could be a way to

enhance IDs' experiences and broaden their skillsets. Important differences between the

way experienced IDs and novice IDs approach their work have also been found by other

researchers. For example, Rowland (1992) found that experienced and novice IDs

interpreted instructional problems differently, with expert IDs approaching problems as

unstructured and ill-defined. On the other hand, novice IDs tended to erroneously believe

that SMEs had given them all the information they needed to solve a problem. Novice

IDs, especially, may benefit from forming a CoP with more experienced IDs until they

receive enough training and experience to form their own expertise (Ericsson, 2017).

IDs may also benefit from the experience of listening to and acknowledging

others' perspectives. Participating in an open dialogue with other IDs about their

experiences may help novice and experienced IDs alike by generating new ideas and

making new connections. Perspective-taking itself can be a good way to promote

diversity of ideas and openness (Hoever et al., 2012).

CoP may provide IDs with an opportunity to discuss important issues apart from

design. Most of the IDs in this study understood that both leadership and followership

are important to the ID experience. However, some also discussed feelings of

inadequacy when assuming a followership role. Wilson (2016) wrote that most western

theories of leadership assume that followers are somehow deficient and need leaders to

do the thinking and planning for them. The reality is that effective followers make a

difference in organizations when they take responsibility for helping to ensure that they

and their peers are ready to meet challenges to their organizations' goals. Ultimately, the

labels "leader" and "follower" may be detrimental to ID teams. When the entire team is

working towards the mission of designing instructional interventions, the mission itself

becomes the leader.

Teaching Experience

Some IDs in the study saw a lack of opportunity to teach in higher education as a

gap in their experience. This may be one of the most difficult to address for various

reasons. For example, academic and professional qualifications are key to being

qualified to teach in higher education. IDs may not be qualified to teach due to a lack of

these credentials. While most of the IDs in this study had at least a master's degree, it is

common for teaching positions in higher education to require a terminal degree.

Therefore, resolving this issue may require IDs to pursue advanced degrees on their own.

One of the benefits of working in higher education, however, is that many schools may

be able to offer assistance in this regard with financial support in terms of tuition

assistance for employees. Faculty may also be able to offer IDs encouragement and

insight on pursuing an advanced degree. There may also be opportunities for IDs to serve

as teaching assistants in courses that are offered at the schools where they work. This

would also give IDs another opportunity to work alongside faculty.

IDs' professional experience may also be limited to their own career field.

Nevertheless, as this study has shown, many IDs come from fields other than ID and may

be able to tap into professional credentials they have earned in those fields. Gaining

teaching experience in higher education will be key to overcoming objections by faculty

that IDs lack teaching experience.

Maintaining Calm and Flexibility

IDs in this study seemed to understand they are expected to solve complex

problems confidently and flexibly, and that this is a critical part of their role. Self-

confidence has a strong, positive relationship with leaders' ability to communicate a

vision and influence others (García-Vidal et al., 2019). While leaders should avoid

grandiosity, those without self-confidence and a willingness to accept some risks in

achieving organizational goals are unlikely to be effective leaders (O'Reilly & Chatman,

2020). IDs who display confidence in their own abilities and who can accept some risks

may be more likely to have influence over design and process decisions on ID teams.

Maintaining a calm outward demeanor is a good way to display self-confidence,

without appearing grandiose. Chaos and crises have become prominent conditions in

higher education (Roitman, 2014). Individual attitudes toward problems can impact how

crises are perceived because there is a socially constructed element to how people

understand crises (Gigliotti, 2019). ID is an area marked by frequent change due to

advances in technology and calls from students to make courses more mobile compatible,

accessible, and collaborative (Weiss, 2019). IDs can provide design assistance to faculty

and administrators so they can create courses that meet these challenges. Just as

importantly, IDs can communicate from their expertise and experience about the

challenges in ways that acknowledge the complexity and seriousness of the problem

without contributing to a perception of crisis.

IDs can practice differentiation to avoid contributing to chaos and crisis.

Friedman (2017) wrote that differentiated leaders are those who keep their goals in mind

and resist being caught up in anxiety and emotional processes present in many

organizations. IDs can help keep the focus and commitment on the goals of good design

to limit anxiety about design. In this way, IDs can contribute to productive ID teams and

help to maintain healthy organizations.

Every design begins as a conjecture (Lawson, 2005). The conjecture is based

upon the judgments of the design team of what approach is likely to solve an instructional

problem, usually followed by the discovery of new problems and further modifications.

Therefore, ambiguity is part of design. Furnham and Marks (2013) wrote that the social

psychology view of tolerance of ambiguity is based upon attitudes towards risk and

decision making. IDs, and even the institutions they work for, could cultivate attitudes

that are more tolerant of ambiguity. This could potentially improve IDs' ability to accept

the nature of design, improve their decisions about design, and reduce the stress that

many IDs in the study expressed about ambiguity. Tolerance of ambiguity could be a

good way to improve IDs' ability to accept the nature of design as a form of conjecture

while also improving their decision-making process and creativity as they design

(Zenasni et al., 2008). Tolerance of ambiguity, when matched with high personal

standards, is also closely linked with adaptive, as opposed to maladaptive, perfectionism

(Gärtner et al., 2020). Overall, adaptive perfectionism is more likely to lead to resilient

IDs who have "positive affect, life satisfaction, psychological wellbeing, and

conscientiousness" (Lo & Abbott, 2019, p. 278). Furnham (1994) wrote that a preference

for closure and a single solution for problems may cause discomfort in ambiguous

situations. However, as described earlier in this paper, design is recursive and iterative,

and instructional problems can have many solutions. Therefore, closure may not

reasonably be considered a goal of ID. IDs who can improve their tolerance of ambiguity

may experience greater satisfaction in their work, improved openness to new solutions to

old problems, and an adaptive approach to leadership and followership that takes context

into account.

Support for the Solution

IDs in this study asked for the ability to connect with IDs from other institutions.

Some of the IDs in the sample were the only ID in their organization. The opportunity to

connect with the wider ID community to form CoP could be especially valuable for them.

Forming CoP could also be a good experience for building relationships. Including

faculty may also promote relationship-building between faculty and IDs. The IDs in the

study also identified collaboration skills as important to them. Collaborating to form and

maintain CoP could help hone and maintain these skills.

Many IDs also recognized that teaching experience could help them to have more

credibility with faculty, as well as help them experience what faculty experience in their

teaching duties. This experience could help inform ID practice and give IDs first-hand

experience in using their instructional products, or those created by other IDs, to support

teaching practice and student learning.

IDs in this study recognized that they have a responsibility to help solve complex

instructional problems. IDs who maintain a calm and confident presence in this role can

be of the most help and can also help alleviate the concerns that faculty may have in

incorporating technology into their courses. Design is complex and IDs cannot expect

faculty to have expertise in this area. Approaching design challenges with calm and

confidence may go a long way to creating positive relationships with faculty and

completing ID projects that are successful at meeting goals.

Factors and Stakeholders Related to the Solution

The main stakeholders related to the solutions are IDs, faculty, and administrators.

IDs and faculty are involved together in ID practice. Administrators are responsible for

policies that may either support or impede ID and faculty collaboration. Most of the IDs

in the study recognized, however, that collaboration between them and faculty happens

independent of policy. They collaborate because ID work requires it, not because

administrators require it.

Sharif and Cho (2015) wrote that many online CoP already exist which IDs may join. They also recommend, where feasible, that IDs within an organization form their own CoP. Their advice is to keep it informal at first and allow the CoP to develop over time. The main thing for IDs to do in getting a CoP formed is to begin contacting other IDs and encourage connections to discuss practice.

Potential Barriers and Obstacles to Proposed Solution

Yanchar and Gabbitas (2011) identified theoretical orthodoxy as a potential barrier to flexibility and openness. They also pointed out that eclecticism has its detractors because theoretical perspectives and the techniques drawn from them are often incompatible. However, they recommended "critical flexibility" (p. 383) as a way to overcome the constraints of orthodoxy, while limiting the drawbacks of eclecticism. They explained critical flexibility as a sense-making process in which designs are analyzed, developed in detail, and critically examined. They promoted an approach that leverages a variety of conceptual resources (e.g., instructional theories, design principles, process models, and philosophical frameworks) combined with an IDs' intent to create a flexible and open approach to design. These conceptual resources should be critically examined over time to bridge the gap between theory and practice.

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Implementation of the Proposed Solution

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IDs themselves should be expected to lead the implementation of the solution. They should prepare for resistance to change. Some of this resistance could come from IDs themselves, who are used to implementing practice the way they have always done. Bryson (2011) recommended dealing with resistance toward change by addressing difficulties that arise during the implementation process and ensuring that all stakeholders

have a clear understanding of what needs to be done, why it needs to be done, and who

needs to do it. A CoP could also serve as a tool for leading change, communicating, and

establishing goals.

Communication will be essential for the successful implementation of the

solution. IDs will need to take time to communicate their vision and goals. They will

need to ensure that stakeholders are informed and involved. IDs should be prepared to

get questions from stakeholders. They should answer these questions truthfully and

thoroughly. There may be questions for which they may not have immediate answers.

However, they should be honest about what they do not know as well as what they do

know and be open to suggestions from stakeholders.

Implementation of the proposed solution will require a commitment by IDs to

connect with each other and with faculty. IDs should begin by forming CoP with IDs in

their organizations or online. Initial meetings could include the purpose of the CoP and

what the IDs hope to get out of it. IDs should keep in mind that the goal of the CoP is to

improve practice for all IDs. Therefore, IDs should commit to sharing what they learn

from their experience with other IDs.

As was mentioned earlier in this study, leadership training is not normally

included as part of IDs' career preparation. Therefore, practicing IDs, preferably with

help from their organizations, should find ways to fill this need. Leadership training for

IDs should focus on interpersonal and team leadership skills, rather than organizational

leadership skills. The focus of team leadership is on adaptive and flexible ways to

improve team performance (Fontannaz & Cox, 2020). This focus relates to the work of

IDs as members of collaborative teams.

IDs should also apply Yanchar and Gabbitas' (2011) advice on critical flexibility. Placing the focus on effective professional practice that can grow and change could be a good way to incorporate new skills and concepts as they develop. IDs thinking critically about their own practice may also help bridge gaps between knowledge and action.

Factors and Stakeholders Related to the Implementation of the Solution

There are multiple stakeholders related to the solution. IDs, faculty, and administration may be involved in the implementation of the solution. However, there will need to be flexibility to accommodate specific organizational structures and norms.

IDs

Implementing the solution will require IDs to take the lead on adjusting their practice. The realities associated with the complexities of design, the need for collaboration, and IDs' role as a guide to achieving instructional outcomes may require a rethinking of how they manage projects. Connecting with other IDs may be more difficult for those who are the sole ID in their organization. However, they may be able to find other IDs through ID-centered organizations or online communities.

Faculty

Faculty can contribute to the solution by engaging in design practice with IDs. While design is the primary skill of IDs, faculty are part of the solution because they are an integral part of the ID team. Faculty and IDs should be thought of as equal members of design teams. Each brings an important perspective to ID.

Administration

Administration should work with faculty and IDs to identify barriers to IDs and faculty effectively engaging in ID practice. Administrators should also work with IDs to

help provide the leadership training they need to effectively lead collaborative teams.

While few IDs in the study identified major administrative barriers to their work,

organizational leaders should support the work of IDs and faculty fully. The courses that

IDs and faculty design are the conduits through which higher education meets one of its

main goals of ensuring student success.

Timeline for Implementation and Assessment

The timeline for implementation will vary depending upon the organization.

Some IDs will also require more time than others to connect with other IDs. Developing

a leadership training program may be the most time-consuming aspect of implementation.

However, IDs in higher education have immense educational resources at their disposal.

Existing courses at their institutions, as well as knowledgeable faculty, could help create

resources that do not already exist.

Implementation of other solutions will mostly require IDs to think differently

about practice. It will take time to develop concepts that improve practice, however. This

is also an element of the solution that will likely never be complete as knowledge will

continue to grow.

Evaluation of Implementation and Assessment

The consequences of change can be difficult to assess (Rogers, 2003). IDs may

not be aware of all implications of the changes. Within each organization, teams of

stakeholders should meet regularly to discuss goals and determine if the changes are

working to meet those goals. The teams could survey stakeholders to assess if they see

change occurring and if it is having any effect on practice. Evaluation should be ongoing

and allow for adjustments as needed.

Practical Implications

IDs, faculty, and administrators may benefit from this study. The greatest benefit will be to IDs who could see improvements to their practice along with less frustration in the application of concepts. Administrators could benefit from improved course designs that have been critically examined by IDs and faculty.

IDs who implement the solutions should expect to see improvements as they apply a more collaborative and flexible approach to their work. Sharing knowledge and practice improvements between IDs can help all IDs to grow in knowledge and confidence. Likewise, improving leadership skills could help IDs to be more effective at leading collaboration and creating effective ID teams. Adopting a flexible approach to the application of theories and concepts should lead to less frustration regarding the application of theories to practice.

Implications for Future Research

The focus of this study was on one of the members of design teams. However, other members of the design team could offer valuable perspectives as well. For example, IDs identified faculty and SMEs essentially as co-leaders and co-followers of design projects. It would be interesting to learn about faculty's experiences with leadership and followership on design teams as well.

Another area open for research would be on how IDs use discretion in terms of making adjustments to processes and timelines. Since no design process is perfect and timelines often change, IDs frequently have to make adjustments as a development project moves forward. The data collected for this study indicated that most of these decisions are made based upon an individual analysis of a specific need. Often these

decisions are successful, but sometimes they are not. A study, possibly from a grounded

theory approach, on how IDs make these decisions, and factors that contribute to

successful decision making about timelines and processes could be informative.

IDs in this study who had teaching experience indicated that they believe that

their teaching experience contributes to their success as IDs. A study could perhaps be

undertaken to test that assertion. The difficulties of such a study could be enormous,

however. Simply determining what makes an ID successful is open to interpretation and

difficult to measure (Hartley et al., 2010). Nevertheless, the belief that teaching

experience makes IDs more successful as IDs is common enough that it should be tested,

if possible.

Implications for Leadership Theory and Practice

Adaptive leadership is an approach to group work in which stakeholders all share

in forming and meeting goals across organizations (Kahn, 2017; Ramalingam et al.,

2020). Given the nature of IDs' work in higher education, IDs may wish to look into

learning more about adaptive leadership theory and applying what they learn to their

roles as IDs. Power structures that invest authority in a strong central figure may work

against IDs' use of their own influence to help design teams work toward common goals.

Adaptive leaders are able to identify when changing situations require changes to

their leadership approach. The pressures of short timelines, changing requirements, and

technological advancement all combine to make innovation and adaptive leadership a

necessity for IDs. However, adapting to changing conditions is unlikely to be successful

unless IDs are able to correctly identify and interpret changing conditions (Yukl &

Mahsud, 2010). Theoretical models to which IDs can turn to help understand these

pressures and apply adaptive leadership principles may prove helpful to IDs.

Summary of the Study

This study was completed to gain a greater understanding of IDs' lived

experiences as members of collaborative ID teams. IDs were found to have roles that

require them to lead or follow as warranted by situation and context. Some IDs were

challenged by the need to adapt to context. It was also common for IDs to express

frustration with different, sometimes competing concepts and theories that informed

design and their roles as nominative leaders of collaborative teams. IDs themselves

perceived these challenges to design and leadership practice as a hindrance to their

effectiveness.

IDs who connect with other IDs to form CoP could expect to gain a broader

perspective on practice. The impact may be most noticeable for novice IDs who can find

ways to connect with more experienced IDs. Moreover, seeing faculty as part of the ID

community could help improve collaboration between IDs and faculty and create more

effective ID teams.

Leadership training that focuses on adaptive and flexible leadership styles could

also help IDs better lead collaborative ID teams. ID requires leaders who can identify

when they need to take charge and when they need to step back and enable others to act.

IDs will need to commit themselves to greater awareness of their own needs as leaders to

improve their ability to lead effective and collaborative teams.

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Appendix

Creighton
UNIVERSITY

Institutional Review Board

2500 California Plaza • Omaha,
Nebraska 68178 phone: 402.280.2126
• fax: 402.280.4766 • email:
irb@creighton.edu

DATE: June 5, 2019

TO: Tracy Gies
FROM: Creighton University IRB-02 Social Behavioral

PROJECT TITLE: [1353674-1] Leading From the Middle: A
                    Phenomenological Study of Instructional Designer
                    Leadership and Followership
SUBMISSION TYPE: New Project

ACTION: DETERMINATION OF EXEMPT STATUS
DECISION DATE: June 5, 2019

REVIEW CATEGORY: Exemption category # 2

Thank you for your submission of New Project materials for this project. The following items
were reviewed in this submission:

- Application Form - 402 Application for Determination of Exempt Status
  Observation, Survey, Interview-tg-3jun19.docx (UPDATED: 06/3/2019)
- Creighton - IRB Application Form - Creighton - IRB Application Form (UPDATED:
  04/14/2019)
- Letter - Participant Information Letter.docx (UPDATED: 05/16/2019)
- Letter - LOA.pdf (UPDATED: 04/15/2019)
- Other - interview protocol-TracyGies-3jun19.docx (UPDATED: 06/3/2019)
- Protocol - Design Protocol-TracyGies-3jun19.docx (UPDATED: 06/3/2019)

This project has been determined to be exempt from Federal Policy for Protection of Human
Subjects as per 45CFR46.101 (b) 2.

All protocol amendments and changes are to be submitted to the IRB and may not be
implemented until approved by the IRB. Please use the modification form when submitting
changes.

If you have any questions, please contact ▇▇▇▇▇▇▇▇ at ▇▇▇▇▇▇▇▇ or
▇▇▇▇▇▇▇▇▇▇▇▇▇. Please include your project title and reference
number in all correspondence with this committee.

This letter has been electronically signed in accordance with all applicable regulations, and a copy is retained within
Creighton University IRB-02 Social Behavioral's records.