Expert Instructional Designer Voices:  Leadership Competencies Critical to Global Practice and Quality Online Learning Designs

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Abstract

This paper offers qualitative evidence that leadership competencies and characteristics activate quality global learning technologies, although those competencies remain mostly unrecognized as having relevance to instructional design (ID). In a study designed to explore current perceptions of what is needed to improve the quality of online courses, the voices of an international group of instructional designers were captured and analyzed for common themes of significance to the ID community. Analysis of the discourse engaged in during in-depth interviews provided a framework of leadership characteristics that were positively associated with high quality pedagogies—strategy, vision, personality (interpersonal skills), productivity, emotional/psychological strength, values, and duties. From these themes, a model of leadership is presented, followed by suggestions for urgently needed streams of research into the critical issue of ID leadership for quality.

Introduction

In spite of on-going advances in 21st century instructional technologies, web-based higher academic pedagogies continue to demonstrate a lack of quality (Means, Toyama, Murphy, Bakia, & Jones, 2009). The perception of lower academic standards is emphasized by an on-going distrust in online courses by a majority of US educators (Allen & Seaman, 2012; Seaman, 2009). From an international perspective, Daniel (2007) referred to online pedagogies in India as “mostly rubbish” (Affordability section, para. 15), while Uysal and Kuzu (2009) reported a problem in Turkey of no online standards in existence. Online learning offers a flexible option for those with various restrictions, including geographical access and financial constraints. It has been posited that the current economic challenges for students seeking to compete on a global scale with an advanced education has contributed to a continual rise in online enrollments (Allen & Seaman, 2010; Robinson, 2009). However, the persistent state of less than stellar online courses undermines the efficacy of educational opportunities afforded by the internet.

In light of perceptions of lower quality, the practice of designing products for online learning has been called into question in terms of the competencies and leadership of instructional designers (Beaudoin, 2007; Kowch, 2009; Naidu, 2007; Reeves, Herrington, & Oliver, 2004; Sims & Koszalka, 2008) needed to improve the situation. This notion aligns with the business and trade industries where improvement of products has been inextricably linked to leadership. For example, Steve Jobs, after an earlier departure, returned to Apple in 1997 and led an industry with re-envisioned ways of communicating information (Isaacson, 2011). Who can deny that his leadership resulted in exemplary products? Consequently, a study was undertaken that would explore a potential connection between the quality of ID products and an instructional designer’s leadership competencies.

The study’s findings emerged from an international panel of expert practitioners’ lived experiences, conveyed through perceptions of a practice that blurs the lines of standards usually understood for ID (Association of Educational Communications and Technology (AECT), 2012; Larson & Lockee, 2009). The participants specified competencies for designing online pedagogies with the added dimension of applied personal leadership characteristics deemed critical to high quality designs—Competencies, Attributes, and Duties. In addition, specific instructional strategy components known to predict engagement (NSSE, 2008) and learner satisfaction (Sims & Stork, 2007) framed a model for leading the online design process forward—strategy, vision, personality (interpersonal skills), productivity, emotional/psychological strength, values, and duties. As a result of these
findings, the goal of the study was satisfied: to determine whether leadership from instructional designers would have a significant impact on the vision many share for quality online higher educational products.

**Background and Context**

As an outcome of studying the ID process and its value to online learning, certain questions percolated which called for answers. What is needed to improve quality in online courses? What competencies may be critical to design effective pedagogies for a changing student body with diverse needs? What characteristics of ID are lacking to meet global socio-educational demands? Although standard ID competencies (AECT, 2012; IBSTPI, 2000) are well established for best practices, it was noticed that leadership competencies were nearly absent from the prescriptions. Upon further exploration, the topic of leadership as a characteristic of instructional designers was just as scarce (Kowch, 2009). What was found in the literature were suggestions that instructional designers lead educational transformations by embracing a need to change inappropriate or misapplied practices (Beaudoin, 2007; Kowch, 2009; Naidu, 2007; Reeves, et al., 2004; Sims, 2006). The notion corresponds with Smith (in Fullan & Scott, 2009) who declared a quiet crisis in higher education from dependence on a model that “flies in the face of what we know about how people learn, the opportunities that technology presents to transform the educational enterprise and our historic record of failure with a rapidly diversifying population” (p. 20). In addition, Fullan and Scott (2009) observed a lack of leadership competency and experience in those expected to be change agents of education. The concerns amplified reports of ineffective and irrelevant design practices such as text-based lectures loaded into a course room, practice components, multiple choice quizzes and tests, a deck of slides for learning enhancement, a term paper (Naidu, 2007)—and not much more.

Questioning the design approach of adapting traditional course designs to the online environment was important because studies were beginning to show that people actually learn differently interacting with a computer than with a human interface (Dede, Dieterle, Clarke, Jass-Ketelhut, & Nelson, 2007;Spiro & DeSchryver, 2009). On-screen text and slideshows may not have engaged the learner, yet various multimedia affordances were showing promise to capture and hold attention (Thompson et al., 2011). Dede et al.’s (2007) study found positive learning outcomes from students connecting and learning in new ways—with computers, essentially a new mode of learning (Beaudoin, 2007). Later, Dede’s (2011) explorations took him into mobile learning and the potential of engaging in learning in new ways with cell phones. The challenge for educators and producers of pedagogical materials is to progress along the same continuum as the new paradigm of digital learning.

To explore the problem of quality in online course designs, a qualitative research study purposed to identify the critical ID competencies needed to produce effective designs for modern learning. Acting on the assumption that there may be a connection between leadership competencies—or characteristics in general—and an approach to the design process, an inquiry method of studying expert instructional design professionals in the context of practice was proposed and undertaken.

**Theoretical Framework**

A literature review conducted for purposes of grounding the study presented in this paper found that leadership theory encompasses copious philosophies, competencies, traits, attributes, attitudes, positions, and roles, which have been applied to a multitude of professions (Zenger & Folkman, 2009). To narrow the focus of the study, competency theory provided a relevant lens of exploration and was defined as behavioral demonstrations of knowledge, skill, and ability (Dooley, Lindner, Telg, Irani, Moore, & Lundy, 2007); this was relevant to the study of ID practice, one that demands multiple competencies (Larson & Locke, 2009). During the literature analysis, it was discovered that both leadership and competency components were often interchanged with attributes and character traits. To mitigate obfuscation, and to gain a consensus of meaning for each term that would inform the study, the review resourced from a multi-disciplinary body of literary work. The cross-disciplinary approach was necessary, as the ID literature revealed a paucity of conceptualizations of leadership in personal practice or of its impact on the field and its products (Kowch, 2009; Spillane et al., 2004). Thus, a synthesis of theories framed the study being presented with multivariate characteristics of leadership categorized under competencies and attributes.

Leadership Competencies

A major predictor of work performance is competency, which enables the accomplishment of a desired or prescribed task (Dooley et al., 2007). Competency is a general category characterized by multiple components, of which strategy, vision, personality (interpersonal skills), and productivity are defined below.
First, leaders are competent in developing a strategy that will include proactive plans for the future (Scott, Coates, & Anderson, 2008). In other words, they reflect on methods to prevent problems rather than wait for them to happen. The Scott et al. (2008) study revealed that participants perceived leaders as engaging others in the process as well as collaborating for best possible solutions to, not only current but, unforeseen problems and challenges. Furthermore, leaders know where to go for the answers or the knowledge to create answers; they make the right connections in a network of colleagues and technology (Siemens, 2004; Sims, 2006).

A leader is commonly known to possess vision and, as such, is recognized as a visionary (Howard & Wellins, 2008). A leader also serves as a “steward of the vision” according to Sackney and Mergel (2007, p. 94). This person not only sees the vision, lives the vision through decisions, conveys the vision to others, enlivens others to the vision, promotes the vision but, at the same time, encourages others to share in the vision (Kouzes & Posner, 2007). Leaders as visionaries recognize innovation, forward-thinking, uniqueness, and “respond creatively to world conditions and the current state of their own society” (Greenleaf, 1977, p. 321). Scott et al. (2008) regarded this characteristic as having a capacity to see the big picture and to “read and respond to a continuously and rapidly changing external environment” (p. 11), a notion that may also be interpreted as possessing global competency (Reimers, 2009).

Leaders convey personality within the dynamics of human interactions. The notion resonated with a pervasive claim in literature that communication is the linchpin of all successful leadership (Sergiovanni & Corbally, 1984). Sergiovanni and Corbally (1984) defined interpersonal competence as an essential force of leadership. Moreover, demonstrations of genuineness stem from active communication. Kouzes and Posner (2007) described leaders as caring, confident, and respectful to others. In contrast, Howard and Wellins (2008) cited the primary cause of failure by a large percentage of organizational leaders was lacking in interpersonal skills.

Leaders have been described as those who understand how to work hard to achieve results; in other words, competency is evident in their productivity. A study of leadership roles in virtual teams showed that learners preferred a producer (Chen, Wu, Yang, & Tsou, 2008), a leader who gets things done, over a visionary. In this capacity, leaders are expected to do what they say (Argyris & Schön, 1992) by converting words to action. In brief, results are produced by skillful leaders who have been trained in specific capacities, and work until the job is done. When taken together, the competencies listed also describe the work of a designer or an ID team, and, consequently, provide a glimpse of how leadership may link to ID practice.

Leadership Attributes

The category of attributes included emotional/psychological strength and values. Leadership is having confidence and displaying strength in diverse ways (Kirkpatrick & Locke, 1991). Leaders are logical, make good choices, and think rationally, according to Kepner and Tregoe (1997). Thus, the various ways of conveying emotional strength and psychological depth are measured in how one thinks through and responds to challenges (Scott et al., 2008).

Finally, an array of values describe leadership, including one operating from conscience (Wolumbwa, Avolio, Gardner, Wernsing, & Peterson, 2008) and personal convictions, and being grounded in moral and ethical principles (Covey, 1989; Senge, 2006). With significance to one of this study’s key assumptions, that leadership is a predictor of quality course designs, Wolumbwa et al. (2008) put forth the notion that moral leadership is a predictor of “relevant organization outcomes” (p. 91). Therefore, enhanced leadership competencies are proposed herein as factors in activating and maintaining quality, globally-accessed learning designs.

Methodology

Research Design

For exploration into the problem of quality in online pedagogical course designs, a phenomenological study engaged a modified Delphi-style approach to invite expert instructional designers with a common interest in resolving a shared problem within a defined social setting (Gelo et al., 2008; Wenger, 1998) to participate in a narrative inquiry study. Understanding that experience impacts decision-making (Ertmer et al., 2008), experts were specified in order to discover what drives the critical decisions that impact pedagogical quality of online outputs. Following purposive selection from 610 members of the AECT that were solicited through email, seven respondents met the qualifications of at least seven years’ experience in ID, with three of those in online design (those selected averaged over 16 years’ experience); and out of the seven, six completed the study. The group included both male and female participants from US and Canadian universities. Sources of data included interview transcripts from research conversations, emails, personal documents, and institution-generated student evaluations. For analysis of findings, constant comparison analysis (Glaser & Strauss, 1977) was used to examine data until congruency was
found in the units of meaning identified for thematic analysis. Subsequently, the interview data were corroborated for accuracy and relevance to personal documents—online course designs created by the participants—which were analyzed with a modified version of the Quality Matters (QM) rubric® for testing the quality of online courses.

Data Instrumentation and Collection

As the researcher and main instrument of collection, I asked a series of questions that were each an expansion on the general question of what leadership competencies were deemed critical to effective online ID course development. To establish credibility and to guide the study, a research protocol was developed to organize the data collection procedure. The protocol called for three rounds of in-depth interviews during which the participants were asked the same 15 semi-structured, open-ended questions. However, certain questions inspired important digressive thoughts; consequently, probing questions were added for eliciting clarification and deeper meaning. Throughout the study, ID voices were captured in the context of daily practice in their respective institutions. Therefore, all data and citations used in the following analysis are confined to these settings, although the ideas recorded may resonate with others in similar situated contexts. In this way, the participating IDs were asked to inform the study from a social constructivist perspective, to construct meaning for a shared practice (Wenger, 1998). Experts often voice common experiences which, when made known, become triggers of change in a community of practice (Campbell, et al., 2009).

Several tests of reliability were included in the research protocol. Because of the intimate nature of narrative research and to minimize influence on the participant’s responses, the researcher practiced bracketing (Moustakas, 1994)—which is the setting aside of one’s personal beliefs and ideas. This is not always an easy task when involved in dialogue, as a researcher will naturally insert personality, interest, and investment in the topic into the interview dynamics. To the extent possible, though, bracketing was accomplished through active listening and by taking copious research notes, notes which later provided for reflexivity (Kaplan, 2004). For example, one journal recorded perceptions of participants’ emotional states, attitudes, and responsiveness to the questions or to the interviewer. The other journal recorded the research process, researcher emotions and attitudes, and the challenges of doing research. Further, in an attempt to reach group consensus on the competencies and characteristics named, inter-rater reliability was established by comparing participants’ answers, then feeding those back to each participant for critical comments. At the conclusion of the study, all methodologies, tests, and findings were corroborated by an external qualitative design expert. Although the study was small in terms of participants, the rich data from a group of experts in ID was, at the least, a great conversation re-starter of what has been, and is, considered an important characteristic for designers of online products, leadership.

Analysis of Findings

A post hoc analysis of transcripts from over 14 hours of recorded narrative relied on NVivo9 software for a constant comparative analysis technique. Phrases (units of meaning) from the transcribed data were labeled with descriptors found in the business, organizational, and educational literature. Initially, the numerous phrases were organized under the general categories of leadership characteristics: Competencies, Attributes, and Duties. However, further distillation generated the themes: strategy, vision, personality (interpersonal skills), productivity, emotional strength, values, and a duty to mentor or to pass on knowledge. The iterative process resulted in some phrases being reallocated; although, at times, the technique generated additional themes and continued to build theory for the study. A list of the themes, along with minimal sample excerpts from the data (abbreviated in most cases), are displayed in Table 1 to convey how phrases were organized into themes.
Table 1. *Themes Extracted from Participants in a Qualitative, In-Depth Interview Study of ID Experts*

<table>
<thead>
<tr>
<th>Theme</th>
<th>Excerpt</th>
<th>Participant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategy</td>
<td>Meet goals set by client: learning objectives, strategies, and personalized</td>
<td>P4</td>
</tr>
<tr>
<td></td>
<td>Allow customer to be part of decisions</td>
<td>P5</td>
</tr>
<tr>
<td></td>
<td>Collaborative team-building</td>
<td>P1</td>
</tr>
<tr>
<td></td>
<td>Interactivity for digital learner</td>
<td>P2</td>
</tr>
<tr>
<td></td>
<td>Offer client informed options</td>
<td>P3</td>
</tr>
<tr>
<td></td>
<td>Synthesize best learning and ID theories; include real-world tasks in design</td>
<td></td>
</tr>
<tr>
<td>Vision</td>
<td>Stay current</td>
<td>P5</td>
</tr>
<tr>
<td></td>
<td>Backup designs with research</td>
<td>P1</td>
</tr>
<tr>
<td></td>
<td>Partners with other educators to accept new approach</td>
<td>P3</td>
</tr>
<tr>
<td>Productivity</td>
<td>Quality control by team testing each element</td>
<td>P1</td>
</tr>
<tr>
<td></td>
<td>Manage time, resources; meet deadlines, prioritize, produce good product</td>
<td>P6</td>
</tr>
<tr>
<td>Personality (Interpersonal Skills)</td>
<td>Satisfy customer through communication and provide solutions</td>
<td>P5</td>
</tr>
<tr>
<td></td>
<td>They (the team) have fun</td>
<td>P1</td>
</tr>
<tr>
<td></td>
<td>Provide expectations, build others up</td>
<td>P6</td>
</tr>
<tr>
<td>Emotional/Psychological Strength</td>
<td>Accept other’s ideas and go with, work with ideas of others (letting go of positional privilege)</td>
<td>P2</td>
</tr>
<tr>
<td>Values</td>
<td>Respect is foundation of leadership in design process</td>
<td>P2</td>
</tr>
<tr>
<td></td>
<td>Accept consequences of decisions, self-leadership, self-regulation, self-management, self-discipline</td>
<td>P6</td>
</tr>
<tr>
<td>Duties (Mentor)</td>
<td>Model collaboration (to faculty, team)</td>
<td>P6</td>
</tr>
</tbody>
</table>

Since the context and focus of the study centered in the participants’ daily experiences, an effort was made during the analysis phase to link the perceptions to practice. Various conceptions and perceptions comprise one’s daily reality in terms of meanings and interpretations attached to the world in which one operates (Pratt, cited in Konings et al., 2005), as well as govern decisions in the work environment (Stein, Shephard, & Harris, 2009). To associate the leadership competencies and characteristics named as critical to quality course designs, participants’ sample documents (online course designs) were evaluated using a modified Quality Matters (QM) rubric®. The quality of the documents was confirmed by the positive results for course structure, including relevant and effective instructional strategies and components. A second analysis observed an alignment between measureable objectives, relevant assessments, instructional strategies, and authentic activities, a construct considered essential to quality academic designs (Bernard, Abrami, Borokhovski, Wade, Tamin, Surkes, & Bethel, 2009; Sims, 2011). Finally, an analysis of student evaluations accompanying the artifacts found three major quality determinants present: opportunities for engagement (NSSE, 2008), activities with learner-centeredness at the core (Sims & Stork, 2007), and overall student satisfaction with the courses.

The results not only identified aspects of practice deemed to be critical to its practitioners; they also suggested a relationship of leadership to higher quality pedagogies. As accuracy was considered paramount, general first impressions by the researcher of the participants’ narratives, along with results of initial data analyses, were reported back to the participants in both verbal and written form for comments and elaboration. The corroborative step was completed before the third and final round of interviews and lent additional reliability to the study, as a more complete context of the research study’s findings was illuminated by each individual participant’s situational perspective (Seidman, 2006). To capture the essence of their unique contributions to the study, a profile of each participant was developed and is located in Exhibit A.
A Model of Leadership for ID

Overall, the findings showed that a leadership mindset is positively associated with high quality work products when certain characteristics are in operation, which formed a model of leadership for ID. The major categories of the model—Competencies, Attributes, and Duties—as well as the themes listed in Table 1, are synthesized and displayed in graphic form in Figure 1. Subsequently, the model is more fully explicated in this section.

![Figure 1. Model of leadership for instructional design (ID) developed from major themes of research study.](image)

Strategy

When the participants discussed various aspects of strategy, two distinct subthemes were identified: overall design process strategy and instructional strategy for the design relevant to digital environments. The panel members articulated a leadership mindset to make (a) strategic decisions for the institution to align epistemological and administrative approaches with online learner demands, (b) strategic decisions for the design team to research best options for providing strict alignment of objectives to assessments, content, and activities, and (c) strategic decisions for the design structure to afford engagement with context-relevant learning flexible enough to adapt quickly to advancing technologies.

Design Process Strategy

The importance of the leadership competency of strategy for the organization and design team resonated with Scott et al. (2008) who implied that leaders are competent in developing strategic, proactive plans for the future. In other words, leaders are adept at engaging others in the process to collaborate for best possible solutions to current and unforeseen problems and challenges. Dooley et al. (2007) concluded, this type of competency is evident during the creation and implementation of courses and in the critical decisions underpin high quality, effective, and relevant designs. In this capacity, leadership is essential to the building and functioning of the team for an efficacious design and development effort. Participant 6 stated this position on decision-making,

Leadership really deals more with the types of decision that one has to make and the way that one makes and executes these decisions…decision-making skill is definitely one of those leadership competencies…as well as willingness to accept the consequences of your decisions…you take responsibility for that and you don’t shift it to someone else.
Another aspect of strategy is connectedness. The views of participants in this study were consistent with those (Siemens, 2004; Sims, 2006) who posited that leaders make the right connections in a network of colleagues and technology for expertly accomplishing the task at hand or anticipated. Likewise, Scott et al. (2008) posited that leaders know where to go for the answers or knowledge to create the answers to questions of design.

Collaboration with others in the field, as well as with those from other disciplines, adds a dimension of connectedness to practice from which springs inspiration for creating innovative and quality courses. Sims (2009) described a proactive mindset of collaboration and connectedness with each design stakeholder to ensure quality learning products as outcomes to ID efforts. Participant1 stated,

I think it’s the leaders who can create and will create collaborative teams made up of people with diverse perspectives and talents, skills, and expertise…the ones who will be developing the engaging, motivating, interactive, and effective learning environments for today’s learners.

The study also found that a critical factor in producing quality courses is staying current with research in technologies and emerging learning theories. Connectedness and collaboration are not dissociative. One participant gave an illustration of an online research writing course he had written that resulted in a reported satisfying outcome for the learners. It required tailoring the course to the research he had done on current best practices for online learning and from collaborating with others who had already envisioned and/or designed a course like this. He also relied on media experts for the latest methods of presenting the course content; these were strategic leadership actions that resulted in an effective course. Summarizing this aspect of the strategy theme, Participant 3 expressed,

…you have to have a knowledge of the latest learning theories and the latest instructional design theories in order to be a leader. You also have to be able to implement those theories, individually and in concert with each other, to achieve best practice, instructional strategies, or instructional strategy design.

At the same time, online delivery requires letting go of outdated practices for effective learning. Participant 1 recognized this need,

We’ve known ADDIE forever, we’ve known this model forever; but, the online models are different because it’s a different delivery modality. So just get the most current research and information you can on what is best practices.

Design Structure Strategy

The second type of strategy linked to leadership competency was described as the ability to specify appropriate—research-based and contextual—instructional strategies with relevant learning components—to the student and to the environment, and having those align with the intended learning outcome. A depiction of this concept is conveyed in Figure 2 and articulated by Participant P6,

We would tend to focus on, as far as basic axioms of instructional design, the one that objectives are measurable and that the objectives are aligned with the assessments, and the objectives and the assessments are aligned with the content…allowing you to meet the objectives.

A second and related issue is the development of the instructional strategy proposed for the design. Figure 3 is an aggregated list of the components identified by the study group as paramount to a quality online course: authentic tasks, interaction, learner-controlled tasks, problem-solving, theory-based instruction, and values-based instruction. Together, the components provide a foundation of engagement and learner satisfaction through a contextualized and personalized learning approach posited by Sims and Stork (2007) as essential for effective online learning.
Going beyond the identification of strategic components in general, the expert designer’s experiences paralleled examples of innovative approaches in the literature, such as social networking and mobile technologies (Velletsianos & Miller, 2008). Their perceptions underscored Reimer’s (2009) conclusions that instructional designers demonstrate competence—distributive, collaborative, and participatory leadership—by specifying nontraditional resources where appropriate for, in his study, an international student body. For example, The University of the People (www.universityofpeople.org) requires its designers to select open source (free) textbooks, applications, and journals to expand access and affordability for their free online program. Participant 2 expressed her strategy as having the flexibility to see a future outcome through a unique point of view and to expand her own knowledge of design components and their potential as having, as she stated,  

...the ability to recognize and work within the concepts of different and better [emphases added].

It is this kind of innovative thinking that demonstrates strategic leadership on the part of the instructional designers with an eye on the future.

Vision

Zenger and Folkman (2009) studied the effectiveness of leaders from a cross section of organizations and identified the characteristic of strategy in operation, which was summarized as, “to translate organizations [punctuation missing in original] vision and objectives into challenging and meaningful goals for others” (p. 70). The assumption is that business—and educational—organizations first develop a vision before a strategy. Likewise, instructional designers translate the vision and objectives of a client for an educational goal into a course design. From this perspective Participant 6 remarked, “I take information and I translate it into an environment that facilitates learning.” During such pursuit, the ID infuses a measure of his or her own vision for what may be the appropriate structure, strategy, affordance, and learning components for a high quality learning experience. Participant 6 interpreted this competency as, “the ability to see the big picture”. With a similar perspective, Participant 1 likened the visionary role of an ID to leading a sports team,

...it’s having this quarterbacking skill, being able to read and see things two or three tasks ahead so that you… can foresee possible issues or challenges that are going to come up and try to get those taken care of before your team is at that level.
Second, a global view for the field and for education in general was viewed by one panel member as being aware of “contemporary” and “emerging technologies.” Going beyond awareness to action, Participant 2 stated vision is,

…the ability to lead in the design…implementation…development of the new things that come along.

Instructional designers may envision and design for future trends in delivering education afforded by social networking technologies (Ashbaugh, in press). The findings in this present study confirmed that instructional designers demonstrate vision by specifying nontraditional resources, such as wikis (Baggio, 2008). However, having a vision for new pedagogies carries a responsibility to investigate its potential. One participant shared a story of experimentation with a wiki before she had gained a thorough understanding of how one works. Her embarrassment over not having learned enough about the technology was obvious as she told her story of “a disaster” in front of a classroom full of students. The lesson learned was that, while freely exploring innovation, designers need to resist prescribing new technologies before doing as much research as possible.

Personality (Interpersonal Skills)

For the design team, communication and meaningful dynamics are essential to a quality outcome and emanate from a leader’s personality. Larson and Lockee (2009) considered interpersonal communication within diverse settings as vital; although, how to approach others in the intimate settings instructional designers often operate within may require a characteristic of personal leadership. The study participants related that instructional designers listen carefully to arguments by the team or clients and articulate decisions from a practical, firm position. Interpersonal skills afford designers of online pedagogies an opportunity to exhibit leadership by offering academic and relevant arguments for the design, strategic, and team decisions while taking responsibility for the final outcomes. This view of leadership in action was expressed by Participant 1 as being,

…able to communicate technological possibilities, letting people know what is possible with technology…being able to be quite frank with them.

Participant 6 shared his experience with leading in creating positive team dynamics,

I need to provide an atmosphere, a working atmosphere, that is not intimidating and that helps them feel that they can be creative, and that they can inject their ideas and criticisms in areas that they see needs improvement, so that they can participate with this.

Another participant stressed the need for patience and partnership by working with a client to help them see a better way, through the lens of a professional, while acknowledging the client’s and the advising subject matter expert’s (SME) unique contributions.

From a synthesis of the participants’ perceptions on personality, it was apparent that the typical view of communication considered essential to leadership (Howard & Wellins, 2008)—ability to articulate—may not provide a broad enough understanding. Communication assumes various forms which stem from personality—interpersonal skills and attitude, ability to convey ideas and to practice reciprocity, and respect and honesty. Clearly, in this study it was shown that an ID brings a unique personality to a design with a potential for leading in its quality outcome through each dynamic of interpersonal encounters.

Productivity

The study group named most of the known competencies of productivity associated with a good ID process such as: “meet deliverables”, “lead in implementation”, “time management”, “know strengths of team”, as well as motivating skillset improvement and keeping costs down. Often, the range of tasks involved in developing academic courses within client time and budget constraints (Moore & Kearsley, 2005) demands leading in hard work as well as finishing the job, in spite of limitations by institutions bent on following what Campbell et al. (2005) deemed cost-recovery models. In the context of preferring cost over quality, Participant 4 personally witnessed a less expensive approach to practice of relying on template-based design strategies. Considered an unproductive practice, she remarked,

I understand why they were doing what they were doing…but they could never reach real high quality doing what they were doing.
Ostensibly, there is an inherent quality of leadership that emanates from an inner desire for meeting goals, for getting the job done, and for completion without sacrificing relationships. Participant 6 viewed the motivational aspect of leadership as “set [ting] the course” while another Participant 1 summarized,

…[it’s] using your inner relational skills to build positive, collaborative, cohesive teams to meet your deliverables…plus you have to know how to motivate them if you’re going to get all this done…and helping them honor and respect each other’s skills and expertise.

From an end results perspective, Participant 1 added,

The lead instructional designer sets the tone for the team. If he or she is proficient, the end product will reflect that.

Emotional/Psychological Strength

A leader possesses or gains a measure of emotional or psychological strength, which is often displayed in intentional decisions made from self-confidence and strength of purpose; although, this is not always an easy task when confronting inflexible institutions and faculty with entrenched epistemological ideas (Campbell et al., 2009). Conversely, participants of this study described experiences in which an inner strength was activated to lay aside personal preference in lieu of honoring a colleague or client’s theories. This attribute was seen in the previous theme of strategy when a participant recognized an outdated practice and used a better approach. Maxwell (2007) considered leaders psychologically strong when they operate on the offensive and not the defensive, with openness to other ideas, opinions, and criticisms. On the other hand, Campbell et al. (2009) found instructional designers in moral conflict with client epistemologies and often without a sense of power to make changes. To this end, the study participants cited having “a lot of patience” and “being able to work with it” (emphasis added).” Clearly, instructional designers are called upon to make complex, emotional decisions within a shifting learning environment while maintaining a rational approach (Kepner & Tregoe, 2007); and this study suggests, they will need leadership strengths to succeed.

Values

One area of obvious concern for instructional designers that is operating from a set of personal values—for the entire spectrum of stakeholders although particularly for the learner. Care is given to provide for the vulnerable, the disabled, and a multi-cultural learning community. One particular participant in this study stressed his lived out values and perceived personal leadership in this way:

I think that, for a leader, it really involves who you are even more than what you do…in the field of instructional design, I guess I’m looking at more character traits than competencies…I would probably still hold honesty as the most important…it’s about honesty and integrity

The personal perspective of leaders with values and the significant influence on design practice is echoed repeatedly in the literature and has been conceptualized as an individual having an inherent moral purpose (Fullan, 2001). Moreover, the Campbell et al. (2009) study revealed deeply-held values in instructional designers who considered their practice a moral one with important social responsibility and influence, who “prefer[ed] to practice within a zone of moral coherence” (p. 660).

Duties

The theme of ID duties was discussed by participants mainly in the context of mentorship. With a sense of obligation to pass on knowledge gained through experience, instructional designers interpret the value of course designs to the client and to others through verbal and nonverbal interactions. In the process, there is a natural tendency to act as a mentor or instructor in the more complex nuances of design. As one Participant 4stated about her experience with clients,

You are educating at the same time that you are doing the design…you have to double check on that all the time, that people actually understand what it is you’re doing.
Adding a layered view to the mentoring process, Participant 2 articulated the need for acting in multiple capacities in her role as an ID with faculty oversight,

So, mentoring the junior people just in the basics of instructional design and how it works, sometimes on an individual level, sometimes they’re working in the context of the larger project, so in the project of the team…and sometimes I have teams of instructional designers, so it may be your journeyman instructional designer who is actually him or herself mentoring these juniors…to help them mentor the juniors.

A perception of diminished status by instructional designers in a Rogers, Graham, and Mayes (2007) study implicated a field tasked with educating the world from a powerless position. Campbell et al. (2009) described study subjects’ views on the designer’s status as a “technician that primarily implements techniques and principles” (p. 661). The study participants (Campbell et al., 2009) described feelings of low respect and held perceptions of negative impact on their professional status and influence. It was argued that instructional designers suffered from an historical view of leadership as one of a positional role. However, it is increasingly evident that individuals in any role benefit from a leadership perspective (Gressick & Derry, 2010; Kowch, 2009). Beaudoin (2007) supported the notion of distributed and multiple leadership roles as important to the future of instructional technology (p. 520). More than this, the ID demands regard for the earned role of leader (DeBlois, 2005). In an interview study of faculty and practicing instructional designers DeBlois (2005) found a majority shared a perspective that includes a change agent and visionary role for leading the academy on what and how to change for a fluid educational world. Most significant to the study conclusions offered in this paper, the participants in that study linked success with embracing the leadership attributes needed for advancing the field. Therefore, instructional designers of higher academic online pedagogies are challenged to update the competencies and approaches that underpin exemplary practice.

Discussion

This study has shown that multiple competencies and leadership characteristics combine to create a quality product. Zenger and Folkman (2009) coded thousands of responses to their longitudinal survey study and arranged the findings into a model of five expressions of exemplary leadership—character, leading organizational change, focus on results, personal capability, and interpersonal skills. With close resemblance to their work, what was critical for leading in quality design practice was summarized by P1,

Leadership competencies are, again, having a process, having a process that works; pulling together people, making sure that the interrelationship skills are there and working; knowing who to contact for help; again, using clear communication skills to convey the purpose and timelines, keeping them on the timelines; and, trying to build a collaborative team who have buy-in and ownership of this course.

In contrast to that participant’s more global perspective, Participant 3 stressed his view of technical skills as critical to quality. He stated,

Unless you can implement best practice in instructional strategies, the online instruction, basically, remains back in the dark ages of instruction…Looking at online course quality is figuring out which factors matter the most. And so when everything is said and done, leadership is about finding those factors…

Participant 2 summarized the study’s findings with these thoughts,

I do think that the leadership qualities are integral to the course design, to the student learning, to the outcomes that you’re going to get, to future transfer…not only in the subject matter content that you are doing, but also transfer in the instructional design principles and the educational precepts that are really important in higher education everywhere.

With this response, the significance and importance of the study was distilled with the learner at the apex. From the evidence gathered in this study, it is posited that practicing instructional designers are capable of adopting and operationalizing leadership skills, abilities, and attitudes critical for improving course designs that equip future world citizens and leaders. As one participant expressed, “it’s having a mindset.” That mindset is
broad and demands a new way of thinking. A new way of thinking or a new approach is often linked to those who lead, and just as often to the development of new or better products.

As online education progresses, the burden of research is continuing to show that course structures and materials written for one type of learning situation need to be different than when learning in another—and since most instructional designers in practice today were trained for traditional requirements, they may need to be retooled for creating relevant and quality online products. In other words, instructional designers need a reorientation in thinking about designing for an evolutionary change in educational deliveries. This is because the literature increasingly called for a response to the demands of a new paradigm of learners for an instructional design vision that will encourage global collaboration among institutions (Durdu, Yalabik, & Cagiltay, 2009) and cultures (Reimers, 2009), through best-fit models and relevant curricula for quality online learning. Reimers (2009) contended global competency is essential for designers of online initiatives privileged with the responsibility of training the world’s learners in respectful awareness of and value for other cultures.

Arguably, leadership is a controversial concept for the typical designer who has been trained for a supportive role (Campbell et al., 2009) with very little potential for leading on a personal or positional level (Gressick & Derry, 2010), let alone lead in a new way of learning. To help quell apprehensions of an important, reborn concept, this paper intended to illuminate the voices of expert instructional designers who found leadership to be a critical component of exemplary ID practice.

Conclusion and Future Research

The seldom discussed notion of leadership for daily ID practice (Kowch, 2009) posited in this paper was intended to be an extension of a conversation started by leaders in the field during the last decade (Beaudoin, 2007; Naidu, 2007; and others) who called for leadership recognition for an effective ID practice. The experts whose voices are heard in this paper augmented the concerns of their predecessors. Together, the calls underscored the motivational purpose of this study: to identify and understand what will enhance the quality of learning events for students from any culture who are, or hope to be, engaged in e-learning. It has been the aim of this study to present multiple streams of thought as to how leadership drives and delivers a quality product for online environments and all learners. The voices of expert instructional designers contributing to this study created a sense of urgency for creating new research streams for infusing leadership competency training into advanced degree programs, extending inquiry into practitioner’s perceptions of leadership’s place in daily practice, and broadening research variables such as gender, ethnic, and geographic effects.

There remains a need for methodical research to confirm current views on what role leadership plays in the product quality of instructional designers. The critical nature of improving the structures for learning outcomes was highlighted by Participant 3 who warned that if quality does not become the focus of attention and dissemination in the field of online instructional design, “the majority of the instruction is going to remain inferior.” One remedy to this indictment was suggested earlier by Hannum (2009) who admonished researchers to rigorously explore “variables that directly influence outcomes” (p. 173) of the online environment. Still others shared the need for continuing domain-specific research on strategies required in a modern learning environment (Bollettino & Bruderlein, 2008; Hong & Sullivan, 2009). Conducting a perceptual study of Canadian graduate students, Webber and Robertson (2004) found a need for greater cross-cultural understanding of the learner’s educational contexts, as well as a need for international thinking about leadership. Finally, with vision in mind, Reimers (2009) promoted emergence of grassroots efforts to organize, define, and promote global competency throughout curricula—an ongoing challenge for leaders in instructional design.

To further this discussion, course designers and others are urged to pay attention to the powerful voices of experts in the field guiding this study for how increased leadership characteristics in practice will move the online education agenda forward toward more excellent products. It is further hoped that the conversation begun by IDs in the previous decades will gain renewed attention to the more critical elements of leadership and its role in the quality of global learning events.
References


Participant 1 (P1)

A full-time professor who instructs at a United States university with significant online course offerings, P1 leads a teacher training department from both an instructional technology and educational leadership background. While bringing 12 years of experience to the study, P1’s extensive knowledge in issues of quality course designs added to the findings of this study during three interviews. Her contributions of personal documents were incorporated into the analysis of relevant artefacts and student evaluations.

While filtering leadership through a lens of team leader, this participant emphasized interpersonal skills and knowledge of team skills in that role. P1 focused on a leader's need for personal knowledge, skills, expertise, and proficiency. Design leadership competencies perceived by her included knowledge of current research on best practices and team-building. P1 was concerned with increasing student learning by aligning course strategies and activities with course and program outcomes. In addition, P1 expressed a belief that leadership decisions influence designs through knowledgeable choices for affordances such as appropriate technology and texts, as well as reliance on student feedback for improvement. Moreover, the experienced practitioner attributed a team-building, collaborative process to a successful practice of quality online course design.

Participant 2 (P2)

P2 is a full-time professor with teaching, training, and research duties for a Canadian university’s educational technology department. The participant reported 22 years of experience in the field and brought her expertise into this study through three interviews, personal artefacts, and student evaluations.

While filtering leadership through a lens of a team leader role, P2 emphasized leadership as a means to an end: creating effective learning (happy clients) through team collaboration and growth. She focused on a leader's ability to lead projects, giving clients informed options, and creating innovative, team-based designs. Design leadership competencies perceived by P2 included recognition of what is “different and better” and respectfully conveying the validity of instructional design principles underlying the recommendations offered. Additionally, P2 was concerned with increasing student learning by advocating activity theory, mediation with tools, constructivist strategies, and authentic activities for metacognitive learning. With conviction, P2 acknowledged a leader’s decisions influence designs through reliance on student involvement, students as “co-builders” of contextual, situational course topics and assessments; ultimately, leaders impact student satisfaction in these ways.

Participant 3 (P3)

With over seven years of experience practicing in the instructional design field, P3 added knowledge to this study from multiple perspectives and background in the e-learning industry. While completing a PhD in instructional technology (at a United States university), P3’s extensive research in assessing quality of course designs lent valuable input during three interviews and from personal artifacts and evaluations.

While filtering leadership through a lens of expertise in and application of instructional design theories, P3 emphasized influencing others in improving quality of online instruction in that role. He focused on a leader's ability to implement latest instructional design strategies for best practice. Design leadership competencies perceived by P3 included knowledge of current research, partnership with developers and instructors, and influence on many from a position of expertise and from evidence-based knowledge of best practices and approaches. Furthermore, P3 was concerned with increasing student learning by affording better and current technology-based strategies and inclusion of real-world tasks in the design affordances.

Participant 4 (P4)

P4 claimed a semi-retired status as an expert instructional designer with 20 years of experience in the field. As an adjunct online professor with a technical university, instructed doctoral students, and was a frequent presenter at educational technology conferences worldwide. Although withdrawing from the study after two interviews, her valuable contributions to the study were included in the findings.

While filtering leadership through a lens of modelling behavior through patience in collaborating with the stakeholders, P4 emphasized understanding and aligning with institutional and students’ educational goals in improving quality of online instruction. She works toward a course design that meets the needs of all learners, no matter their learning style or mode. Design leadership competencies perceived by P4 included knowledge of current research, as well as conference attendance and presentations as ways of being a “life-long learner” in the field. P4 was concerned with increasing student learning by affording good student interaction strategies in the course room.
Participant 5 (P5)

A director of a United States university learning center providing faculty development in instructional technology, P5 was working to improve his practice by seeking a PhD in the field. Quality of instructional design was the focus of his work, making him a particularly qualified candidate for this study. Although study participation was limited to the first interview due to scheduling conflicts, P5’s important insights were included in the findings for RQ1.

Participant 6 (P6)

As Dean of Online Studies and Distinguished Lecturer of Graduate Studies for a United States university, P6 contributed significant empirical data from his 20 years of experience in the field of educational technology and design. The scholar presented compelling views on the study topic during three interviews and from personal documents with student evaluations.

While filtering leadership through a lens of both technical and foundational skills in instructional design systems, P6 emphasized honesty, interpersonal skills, and self-regulation as critical to improving quality of online instruction. He focused on a leader's ability to stay current in the latest instructional design strategies for effectively promoting student learning. Design leadership competencies perceived by P6 include setting objectives and relevant, measurable assessments grounded in the learner’s context or situation; thus, a view toward “what the learner gets out of it.” Moreover, P6 was concerned with increasing student learning by affording analysis and problem-solving strategies and activities through interaction and inclusion of real-world tasks in the design affordances.