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# Democratic Implementation of Anywhere, Anytime, Anyway Learning through Blended Synchronous Delivery in a Postsecondary Institution in Canada

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## **Abstract**

This organizational improvement plan considers the implementation of anywhere, anytime, anyway learning in the context of competing stakeholder values in a postsecondary institution in Canada. Quinn's (1983) competing values framework is used to juxtapose the values of students, faculty members, innovators and administrators in the context of educational technology implementation (Yang & Melitski, 2007). A case for anywhere, anytime, anyway learning through web-conferencing in a blended online format is made to each group in the context of that group's value system. Bourdieu's (1984) forms of capital is used: administrators valuing economic capital, faculty members valuing cultural capital, and students valuing social capital. Freire's (1968) model of conscientization is used to argue that humanization is needed to overcome neoliberal obstacles that have stalled the implementation of new initiatives. An implementation strategy based on a community of practice is recommended for a gradual process of organizational change through professional development. The plan concludes that win-win solutions are possible between neoliberal administrators and liberatory/critical/democratic educators. In fact, these solutions may even bring neoliberals into conscientization.

## **Keywords**

anywhere, anytime, anyway learning, blended learning, hybrid learning, competing values, democratic education, educational technology

## Executive Summary

In the 2012 Strategic Plan and 2013 provincial agreement, the institution made a commitment to anywhere, anytime, anyway (AAA) learning. Iorio et al. (2006) describe anywhere, anytime, anyway as a slogan “associated to e-learning with the aim to emphasize the wide access offered by on-line education” (p. 3). The current state of AAA learning in the institution allows some of this flexibility, but blended synchronous delivery or BlendSync (Bower et al., 2016) is needed to implement full AAA learning and fulfill the promise to the province and other stakeholders in the Strategic Plan.

In order to be an AAA institution, students must be able to choose, where, when and how they learn. In the face-to-face (F2F) classroom, students cannot control where and when they come; they also do not have access to various online learning features that affect how they learn. In the asynchronous online classroom, students control where and when they learn, but they do not have access to various F2F benefits that impact how they learn. Neither F2F nor online learning can provide AAA education.

BlendSync, however, provides AAA education adding synchronous and/or asynchronous components to a F2F class. When students can join a F2F class via web-conferencing, students then have the choice over when, where and how they learn. They can decide whether they need the benefits of an online class or a F2F class, and this decision is made on a daily basis.

Additionally, BlendSync builds the economic, social and academic capacity of the institution. Economically, virtual attendance expands the scope of the institution worldwide, and does so with little extra infrastructure expense. The main cost is professional development (PD). Several scholars argue a gradual process of PD is the key ingredient for organization change in educational technology (Christie & Jurado, 2009; Poon, 2013; Eastman, 2007; Driscoll, 2002; Snart, 2010). Socially, students can decide how they want to participate, which is especially an advantage to introverts, parents, those with physical and mental health concerns and those who live a long distance from campus. Academically, BlendSync provides the student the opportunity to learn in the manner that best suits his or her own learning style, and introduces the advantages of online tools to the F2F classroom.

However, different groups in the organization have, of course, different roles which leads to a conflict in values. While innovators consider the research and development advantages, faculty members who need to implement changes desire a slower process. Students are interested in their academic and social development, but administrators must care for financial responsibilities as well, which can create conflicts in values. The Competing Values Model (Yang & Melitski, 2007) was used to assess various documents important to these stakeholders, and it was found that while innovators, students and administrators seem to have an organizational consensus, faculty members were outside of the consensus. Furthermore, faculty members were most concerned with financial and market issues, which is likely due to a general concern for educational technology leading to obsolescence (Eastman, 2007).

Therefore, implementation of AAA learning through BlendSync needs to focus on faculty members. The institution already has some programs of study using BlendSync, and has thus developed PD and the technological capacity to support this mode of learning. However, faculty members must deliver in this style, and so must be convinced that this is not an obsolescence measure.

To this point, much online learning has been in asynchronous online programs which tend not to be relational in pedagogy, but more information transfer. Faculty members need to be able to deliver courses with high social presence. BlendSync is a modality rich in social presence that does not make faculty members obsolete, yet maintains students' desire for academic and social development. BlendSync also greatly expands the reach of the institution and limits infrastructure needs, hence producing economic opportunities.

Implementing AAA learning through BlendSync can expand the economic, social and academic capacity of the institution. Considering the rapid pace of technological and social change in the 21<sup>st</sup> century, it is not a question of whether to pursue AAA learning, but when to do so. If this institution does not lead, another one will.

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## **List of Abbreviations, Symbols, Nomenclature**

AAA or anywhere, anytime, anyway – providing students with the choice between synchronous class attendance and face to face attendance in the same classroom community.

Advocacy and Inquiry workers – those who emphasize common goals, communicate openly and combine advocacy with inquiry (Bolman and Deal, 2013).

Banking Education – seeing students as bank accounts and education as making deposits in these accounts (Freire, 1968).

Blended learning – adding synchronous and/or asynchronous components to a F2F class.

Cheerleader – an advocate for a specific organizational change (Bolman & Deal, 2013; Heifetz et al, 2009).

Conscientization - “...the deepening of the attitude of awareness characteristic of all emergence” (Freire, 1968, p. 109). Synonym for humanization, praxis or self-actualization.

Constitutional document – a piece of organizational grey literature that supersedes all other documents. This is analogous to a country’s constitution that overrules all other laws.

F2F – face to face

GVV – giving voice to values (Heifetz et al., 2009)

Humanization - Synonym for conscientization, praxis or self-actualization.

Hybrid learning – adding asynchronous online components to a F2F class.

Leader-investigator - those who lead people through conscientization (Freire, 1968).

LMS – learning management system

Neoliberalism – serving the needs of the marketplace rather than those of the individual.

NGOs – non-governmental organizations

P2P – peer-to-peer

PoP – problem of practice

Postsecondary – higher education

Praxis – The freedom and plurality to act a humanistic manner (Arendt, 2002). Synonym for conscientization, humanization or self-actualization.

Sacred cows - ideas resistant to criticism; speaking the unspeakable (Bolman & Deal, 2013; Heifetz et al., 2009).

Self-actualization – Achieving one’s full potential beyond survival means (Maslow, 1943). Synonym for conscientization, humanization or praxis.

Silo – an area of an organization that is inward looking and resists sharing power and information with other areas or the organization as a whole (Bolman & Deal, 2013; Heifetz et al., 2009).

Situationality - how someone has been marked by neo-liberalism and how someone is marking neo-liberalism as well (Freire, 1968).

Theory-in-Use workers – those who follow a pattern of behaviour to protect themselves and avoid directly addressing core issues and problems (Bolman and Deal, 2013).

## Preface

Anywhere, anytime, anyway (AAA) learning gives students the choice of where, when, and how they learn through the use of educational technology. This organizational improvement plan (OIP) argues that giving students this option can be an extension of democratic rights for students and a way to combat neoliberalism, while building economic capital for an institution. Four major stakeholders, (a) students, (b) faculty members, (c) administrators and (d) innovators, are considered through a competing values framework, as well as how the values of each stakeholder group consider AAA learning through different forms of capital: social, cultural and economic. Faculty members as a group are found to be outside of the organizational consensus vis-à-vis the other stakeholders. This OIP concludes that humanization is an essential component of rectifying neoliberal obstacles to implementation in the organization.

The purpose of this OIP is to help the organization under discussion transition to AAA learning. This OIP does not provide a catch-all solution; rather, it explores and analyzes the importance of leadership behind what might seem like a smooth and easy transition to AAA learning. The scope of this OIP is to create organizational capacity for AAA learning through a community of practice so that AAA learning will be a competing state to the status quo. Afterwards, another OIP can be produced based on moving toward universal implementation of AAA learning. Therefore, this OIP will not lead to any universal solution but it will guide stakeholders through some of the challenges with respect to differing values that they would expect to encounter during the gradual process of becoming an AAA institution.

This OIP follows a three chapter model. The first chapter introduces the political, social, economic, historical, and digital context of the organization under discussion asking how the institution is able to address student, faculty member, administrator and innovator values in becoming an anywhere, anytime, anyway institution and concluding that a longitudinal process which considers competing values is needed. The second chapter analyzes major stakeholders through a competing values framework to examine how each group values AAA learning through different forms of capital: social, cultural, and economic. The competing values analysis finds the organization is relatively united in balancing its

values, but that faculty members are the outliers. This chapter also analyzes different solutions for organizational change using AAA. It concludes that web-conferencing in classes needs to be implemented with a greater concern for human relations in order to reconcile the role of IT business capacity. The third chapter outlines the implementation, evaluation and communication strategies to bring faculty into the organizational consensus. It offers twelve interventions and suggests a community of practice to lead the building of AAA learning capacity.

Due to anonymization, much of the political, social, economic and cultural context of the postsecondary institution cannot be revealed. This limitation creates gaps in knowledge for the reader. Hence, the general context of implementing AAA learning at the institution is discussed as far as anonymization will allow. For example, citing research from colleagues or institutional grey literature could lead to compromises in revealing the identities of certain parties or put individuals at risk, including the writer. As well, specific details about how the institution functions in its community and relates to external stakeholders cannot be fully considered because of ethical challenges.

It is important to note this project has not gone through an ethics board review, neither at the degree granting institution nor the institution being studied. Hence, it is not only important that the institution in question be protected through anonymization, but the writer and his or her colleagues related to this project also be protected. As an ethics review has not been completed, the personal and professional ramifications are unknown. Thus, some weaknesses and ambiguities must be tolerated by the readers of this document, especially in regards to the specificity to the institution and its different departments.

# Chapter 1

## Introduction and Problem

### Introduction

This chapter defines anywhere, anytime, anyway (AAA) learning and introduces the political, social, economic, historical, and digital context of the organization under discussion. The chapter considers the feasibility of implementing AAA learning vis-à-vis the identity of the organization through a four frames analysis (structural, political, human resource, symbolic) and examines relevant academic literature. The chapter concludes that implementing AAA learning is possible in the organization under discussion only through a longitudinal process to consider the competition of values inside the organization.

### Organizational Context

**Anywhere, Anytime, Anyway.** Given the centrality to this document, the term AAA learning needs clarification. Iorio, Feliziani, Mirri, Salomoni, and Vitali (2006) describe ‘anywhere, anytime, anyway’ as a slogan “associated to e-learning with the aim to emphasize the wide access offered by on-line education” (p. 3). For example, in banking, one has an array of choices: a teller, an ATM, telephone services or online. These choices allow the individual to decide where, when and how to interact with the bank. This variety also extends into commerce (Ashraf, Thongpapanl & Auh, 2014), and family, romantic and sexual relationships (Strassberg, McKinnon, Sustaíta & Rullo, 2013).

Within the educational context, an AAA environment allows the student to decide where, when and how he or she learns best. This is separate from an online institution

(like Athabasca University) in that the student is able to have a face to face (F2F) classroom experience, and different from a traditional institution in that a student can study online, all within the context of the same classroom community. This means they can participate at home via web-conferencing, or physically come to class. The student, not the institution, is now making the choice, which increases democracy for the student. Simsek (2015) argues postsecondary has traditionally adopted a one size fits all model, but that this "...is not acceptable to the generation of digital natives who would like to get their education anywhere, anytime and anyway based on their circumstances" (p. 136).

Additionally, the institution under discussion has a sizeable population of mature students which includes digital migrants (those who matured prior to the Internet Age) who share the values and concerns of digital natives (those who matured after the advent of the Internet Age) in their education. A major obstacle in research is AAA institutions have not yet been studied because many institutions are in a process of transformation towards this learning platform. In Australia, this mode of delivery is known as a blended synchronous environment or BlendSync (Bower et al., 2014). However, research has focused on teaching practices and not organizational implementation.

**Politics of the Postsecondary.** This OIP analyzes four stakeholder groups present within the institution: administrators, faculty members, students and digital innovators. (A theoretical discussion with justification is given in Chapter 2). Each group has its own constitutional document it follows to implement organizational change: the strategic plan for administrators, the labour union collective agreement for faculty members, the student association by-laws for students and the digital plan for innovators. These documents were chosen because each one represents the grey literature that governs the behaviour of

its group. For example, in discussions of new academic initiatives, the faculty collective agreement is the document usually discussed as opposed to curriculum plans, faculty professional development (PD) initiatives, or the professor competency document. Furthermore, department chairs have performance contracts that are tied to pillars of the strategic plan. There is overlap as an individual may identify with more than one group. However, for the purpose of this OIP, the document that governs an individual's actions will also include him or her into the group to which he or she corresponds.

The institution under discussion is a public postsecondary institution in the context of depleting resources in a neoliberal environment. Animosity between administrators and faculty members is a fundamental concern. The faculty union files more annual labour grievances than any other institution of its kind within its province. Executive administrators have been penalized and fined for interfering with union elections and processes. They have petitioned for 50% pay increases, while faculty members receive less than the rate of inflation. Conflict exists about international campuses and the institutional direction with respect to online learning. This has rendered many faculty members suspicious of the strategic plan and administration's neoliberal direction.

For the purposes of this OIP, neoliberalism is defined as an educational system, which serves the needs of the marketplace rather than those of the individual. This discussion is specific to the institution and does not seek to label all administrators in postsecondary education in Canada as neoliberal.

While there are many neoliberal effects on education, it is important to differentiate neoliberalism from classical liberalism. Giroux (2013; 2014) and Ryan



(2012) argue that the classical liberal agenda in education has been abandoned for a neoliberal agenda based on education servicing economic needs, rather than personal growth or the needs of the individual. In other words, education serves the market, not the citizen. Ryan and Tutters (2014) describe the neoliberal context as "...pitted against unsympathetic colleagues, inflexible policies and exclusive organizational cultures" (p. 1). Smeltzer and Hearn (2015) describe postsecondary neoliberal education as having a market-based corporate approach leading to business-like operations and austerity funding stemming from the economic crisis in 2008, stating that it is "... uncontroversial to argue that universities across the West have become increasingly corporatized over the past several decades, seeking private investment and higher tuition fees to replace declining public funding" (p. 353).

While simultaneously trying to expand market-based funding for postsecondary education, the neoliberal environment curtails student and faculty member dissent. Students and faculty members are in favour of personal growth and the needs of the individual. They desire to bring a more classical liberal approach to education, which is in conflict with neoliberalism's attempt to make students both commodity and consumer (Giroux, 2013; Ryan, 2012).

Stakeholders (students, faculty members, administrators and innovators) respond in varying degrees to neoliberalism with their own value systems hence creating conflict within (1) a clash of value systems and (2) a reaction to neoliberalism. Administrators uphold the neoliberal accountability that governments place upon postsecondary administrators which has led administrators to emphasize economic capital measures like student entrepreneurship, employability, fewer tenured full-time positions and more

adjunct or part-time faculty members, in addition to the rising tuition fees in the institution (Giroux, 2013; Ryan, 2012).

Faculty members have reacted to protect their gained cultural capital by resisting corporate modelling, online courses, and student employability measures, as well as using trade-unions to advocate for more tenured positions. Students have found it more difficult to access the social capital needed for entrance into positions in society through greater tuition fees and debt. Innovators have found a culture that is centred on expanding the business capacity of the institution, but not the improvement of student life or pedagogical needs. As Smeltzer and Hearn (2015) discuss, students and faculty members find it more difficult to resist the corporatization of education, as "...those who control the university's purse strings are the ones with access to speech, determining policies, marketing campaigns and strategic plans, while those who do not are structurally encouraged to remain silent" (p. 356). These corporatized values have reactions from each group of stakeholders, which impacts the institution's AAA transition. This conflict is discussed in this document within a competing values framework (see Chapter 2).

**The Digital Institution.** The institution under discussion has had an identity and aspirations toward digital leadership on a global scope since the turn of the century. The stated vision is to be a leader in digital education in so far as being a "digital institution" has become a buzzword inside the organization. The term "anywhere, anytime, anyway" (AAA) appears both in the strategic plan and in its funding agreement with its province. However, these terms are not officially defined within the organization. While there is much integration of educational technology, a definition of "digital" or "anywhere, anytime, anywhere" remains elusive.

The institution has a publically accessible digital direction document discussing the use of digital technology for transformational change. The value of being student centred in multiple modalities is emphasized, yet the neoliberal principles of cost-effectiveness and efficiency are also highlighted. Development in online and mobile enrollment, applied research and digital pedagogy are the principle stated objectives, as is transforming physical infrastructure, information technology, human resources and professional development. There are also specific quantitative goals attached to the digital direction which have not been included due to anonymization.

**History of the Institution.** The institution under discussion has existed since the 1960s and is the largest postsecondary institution in its region with several campuses in the region and internationally. The institution introduced a learning management system (LMS) in 2000, and the subsequent strategic plan highlighted technology as one of its four key areas of emphasis. In the following strategic plan, a commitment was made to greater integration of classroom and learning technologies, with the word “technology” appearing 20 times in the document. Within the 2012 strategic planning document, the institution made an explicit commitment to becoming an ‘anywhere, anytime, anyway’ institution, highlighting this commitment in not only two of its twelve goals in the strategic plan, but also in its agreement with the province.

The institution has the vast majority of its courses in an asynchronous blended format online/F2F, with 20-50% of the course content online in the LMS. This allows the F2F classroom to focus on interactive pedagogical needs like workshopping, group work, project based learning and class discussion. This lies in contrast to traditional lecturing or what Freire (1968) calls ‘banking education;’ simple knowledge transfer in which

students' minds are bank accounts receiving knowledge deposits. While much course content is online, this differs greatly from being an AAA system. Students do not currently have the option to attend via web-conference. The institution also has a large centre for online learning, focusing mostly on asynchronous online learning, in which full faculty members are not permitted to teach (further discussed in Chapter 2).

Despite the fact the institution has made the public commitment to being an AAA school in order to continue to be a digital leader, it has not allocated the resources or fully implemented a major transition to offer AAA learning. This begs the question of how the institution is able to address student, faculty member, administrator, and innovator values in becoming an AAA institution.

## **Leadership Problem of Practice**

*How is the institution able to address student, faculty member, administrator, and innovator values in becoming an anywhere, anytime, anyway institution?*

In its strategic plan, the institution under discussion has already agreed to become an AAA institution, but further implementation of AAA learning is needed. This requires a working definition of AAA learning that gives students the choice of attending classes in person, or virtually. Online classes already mix synchronous and asynchronous components, and the institution has a large online learning division. However, if a course is not F2F, then it is online. This simple and familiar dichotomy is not AAA learning. Implementation of AAA learning requires using web-conferencing in classes to give students the choice to attend either physically or virtually.

## Framing the Problem of Practice

**Is AAA Possible?** AAA learning is quite practical for the institution to implement from a technological and logistical perspective. In order to include web-conferencing in the classroom, a professor needs a webcam and basic training on a web-conferencing platform. The number of students is immaterial, as a class of 50 students could have 20 virtually and 30 physically, or 40 virtually and 10 physically, or any other conceivable configuration. This changes from day to day, depending on the students' choices, thereby increasing their democracy. Aside from buying a webcam, there is minimal necessary cost, especially since the institution already licenses the needed software. One program within the institution has created a specialized classroom with a tracking webcam and several room microphones, but this cost was an enhancement as the program was already operating AAA with webcams. The greatest financial cost is in training.

Due to the flexibility of AAA learning, student success rates were reported to have increased. A professor who coordinates one of the AAA programs recently wrote a graduate thesis on the efficacy of AAA learning in the institution. However, it is not formally cited here due to anonymization. While implementing web-conferencing in the classroom in order to become an AAA learning institution requires a few practical and plausible organizational changes, bringing everyone 'on board' is another issue.

**Leadership Gaps.** There are numerous leadership gaps in the implementation of AAA learning. First, the implementation of AAA learning is not formally tracked in any capacity. Second, there is no administrator tasked with the implementation of AAA learning as educational technology initiatives lie between the purview of the vice-president academic and the vice-president digital strategies. This gap has meant that

taking responsibility for increasing and implementing educational technology has been ubiquitous. Third, faculty members have been unaware that web-conferencing is available through the LMS. Fourth, while PD exists, there is a lack of participation in it in the use of web-conferencing and its pedagogical requirements. Faculty members receiving compensated time for PD specific to educational technology, rather than volunteering their time to learn new technology, is another issue. Fifth, AAA learning is not perceived as an essential objective for the institution. Sixth, web-conferencing is approached and valued differently by different stakeholders (students, faculty members, administrators and innovators) who do not value the same processes. Hence, a competing values framework of consultation is needed. It is important to contextualize this organizational change toward AAA learning as a long-term process, likely generational, that will require top-down system changes, but also bottom-up agent advocacy over years.

**AAA Inevitability.** Failure to act would leave the institution missing what Simsek (2015) argues digital natives and migrants demand: AAA learning. Simsek outlines how profound, yet effective, technological change has been in expansion, democratization, individualization and improvement in the quality of postsecondary education:

The field of education has gone through serious transformations in the last several decades. Almost all elements and aspects of education have changed dramatically. Along with many other factors, emerging technologies have played a vital role in this process. With the help of omnipotent and omniscient technologies, educational services have been provided with greater audiences regardless of their

personal and social conditions. Students have also received better education which is sensitive to their individual differences and circumstances. In other words, both the reach and the quality of education have been improved at a global scale. (p. 133)

In our modern lives, from banking to work to personal relationships, people have the capacity to decide where, when, and how they do things. It is so interwoven into the fabric of modern life as a democratic right that most are not conscious of it. Imagine how strange it would be for someone to say he or she could not engage in social correspondence over the phone or Skype, or for a bank only to open mortgages at branches and not online, or for a movie only to be released in theatres and no other format. For most of history, this was the norm: F2F relationships, physical presence at the bank, and the theatre to see a show. However, people now make these daily choices on an anywhere, anytime, anyway basis. It is important to reiterate that even our family, romantic and sexual relationships function similarly (Strassberg, McKinnon, Sustaíta & Rullo, 2013). Education is a unique sphere in which these choices have not yet fully materialized, but it is difficult to envision a future in which these choices will not inevitably appear in education when they are ubiquitous in the rest of society.

Education will eventually follow the social trend and embrace AAA learning principles. This is a simple query of when this will happen, not if it will. As well, the philosophy of adult education (Elias & Merriam, 2005) and the history of adult education in Canada (Selman, Cooke, Selman, & Dampier, 1998) have been moving toward greater choices in adult education and more democracy in education over the last century, by asking students to take more responsibility and sharing classroom power with them. The

question remains, when will the institution under discussion, which has already publically agreed to these principles, implement these principles and live by them, thereby meeting its espoused values? The proverbial train has already left the station.

Some might question whether AAA learning is appropriate for every field of study, especially those considering more complex issues in the educational environment. It is important to note that AAA learning establishes a classroom community both online and F2F running in concordance. If F2F learning is legitimate for education, and AAA is not, it necessarily follows that online learning is also not legitimate. It draws not only this OIP into question, but also the doctoral program to which this OIP is attached, all the online programs at Western University, as well as the nature of other institutions like Athabasca University and the Open University in the U.K. Like all things, AAA learning can be executed well within a democratic educative lens, or it can be done poorly, serving market principles within an exclusively neoliberal lens.

## **Questions Emerging from the Problem of Practice**

**Continuing as a ‘Digital Institution’.** There is a narrative towards implementation of AAA learning in the institution under discussion. This begins with adopting a LMS in 2000, prioritizing different digital strategies through successive strategic plans, developing online course offerings, creating an identity as a ‘digital institution,’ and implementing 20-50% online components into courses. The next logical step in this narrative is to give students the choice of whether to come to class physically or virtually. The commitment to AAA learning has been made and there are already some programs pursuing AAA learning. Prior to a full-scale implementation plan of AAA



learning, organizational capacity needs to increase, which is the leadership direction of this OIP.

**Classroom Considerations.** Becoming an AAA institution requires all classroom components to be available online, at the convenience of the student. Currently, the institution has this capacity as two programs are already operating with the AAA format. In a modern F2F class, there is the ability to have teacher-student interaction, student-to-student interaction, computer projection of various documents (MS PowerPoint, MS Word, Adobe Acrobat, etc.), informal discussions, and group work. There are multiple types of web-conferencing software (Blackboard Collaborate, Adobe Connect, Zoom, Big Blue Button, Go to Meeting, Web Ex, etc.), yet what is essential is that web-conferencing software is able to load MS PowerPoint, share applications, have a chat feature (informal conversation; alternative to speaking for introverts), breakout rooms (private student rooms for group work), and share audio and video. Every software has its own advantages and disadvantages, and the determination of which one is ‘best’ depends on each institution’s specific needs. The institution under discussion has such web-conferencing software being used by AAA programs available on the LMS. Faculty members have access to formal and informal training through technical support and PD services. Having these components allows the virtual student the same kinds of interactions that the F2F student has. However, it is important to note that this OIP is a document with a focus on leadership, not pedagogy.

Currently, leadership is not concentrating the digital strategies of the institution in andragogical or pedagogical directions but on physical and academic infrastructure. Much investment has been made in improving hardware capacities and transforming

traditional classrooms into ‘e-classrooms,’ which have better physical IT infrastructure for technological use in the classroom. These enhancements help facilitate connected F2F classes which improve technological integration in physical attendance but they do not support specific pedagogical or andragogical needs. Academic infrastructure has been improved by moving towards e-texts and analysis of various forms of educational technology. Nevertheless, these are not leading toward the implementation of the already committed objective of AAA learning.

**Literature Review.** In terms of AAA learning, there has not yet been a body of leadership research in the education field related to giving students a choice between F2F and virtual attendance for the same class. Studies about online education can be excluded here as they do not have a F2F component. In 2006, Iorio et al. described anywhere, anytime, anyway as a slogan “associated to e-learning with the aim to emphasize the wide access offered by on-line education” (p. 3). Research about ‘anywhere, anytime, anyway’ abounds in business and technology literature (Guntha, Devidas, & Ramesh, 2016; Joshua & Koshy, 2011; Singh & Malhotra, 2004). However, education literature focuses on either the information technology context (Abass, Ahmed, Abbas, & Baloch, 2015), accounting applications (Mancini, 2016), insurance applications (Suh & Lee, 2015), governmental systems (Lee & Lai, 2015), virtual classroom online uses (Martin & Parker, 2014), massive open online courses (MOOC) which are free courses that exist outside of formal education (Simsek, 2015), the role of Wikipedia (Staub & Hodel, 2015; 2016) or the literature is specific to issues in online learning (Atri, 2015) that do not include F2F learning as well and are basically introductions to online education. There is literature on blended synchronous environments (Bower et al., 2014), but this has a

classroom focus and not a leadership or implementation direction. The vast majority of these studies are technical in nature and do not include any discourse about how to implement AAA learning or blended synchronous environments on an organizational level.

As online and AAA learning are burgeoning fields, terminology is often nebulous. Three common terms found within the academic literature are ‘anywhere, anytime, anyway learning,’ ‘blended learning,’ and ‘hybrid learning.’ What makes things in the literature very confusing is that ‘hybrid’ and ‘blended’ are used interchangeably (Snart 2010; Swenson & Redmond, 2009). Terms are not yet fixed as academics have only just begun to research this modality. AAA learning can be seen in the context of ‘hybrid’ and ‘blended’ learning, but studies need to be clarified on an individual basis as to their relationship to AAA learning.

Due to their ambiguity, it is important to clarify their definition and efficacy. For this OIP’s purposes, *AAA learning is defined as providing students with the choice between synchronous class attendance and face to face attendance in the same classroom community.* However, blended learning and hybrid learning are terms used to discuss moving course components into an asynchronous format online, and are often interchangeable terms. Snart (2010) commented that hybrid teaching extends beyond technology into any context outside the classroom, including those not involving educational technology. To make matters more complex, Bower et al. (2014) use the term ‘blended synchronous environments’ or ‘BlendSync’ to refer to using web-conferencing in the classroom. For this OIP, *hybrid learning is defined as adding asynchronous online components to a F2F class and blended learning is defined as adding synchronous*

*and/or asynchronous components to a F2F class.* This distinction means AAA learning is a form of blended learning, but is not hybrid learning.

***Implementation Research.*** While research does not exist which focuses on leadership in implementing AAA learning in postsecondary education, there is research about leadership in implementing online learning relevant to AAA learning. These studies conclude the importance of time, money, organization and enthusiasm, as well as discussing the issues around entrepreneurialism, student achievement and instructor autonomy. Christie and Jurado (2009) describe teachers' reaction to, and use of, WebCT. They describe general online pedagogy and advocate for cooperation among stakeholders in online learning and the essentiality of administration support in PD, stating "Of all the stakeholders it is the university leadership that must show the way" (p. 278). Christie and Jurado conclude time, money, organization and enthusiasm are key elements to implementation and organizational change. Driscoll (2002) discusses the variety of modes in blended learning and how it is easily adaptable to a gradual and organized transition into new areas of educational technology. She gives 10 techniques to implementing and improving blended learning in the context of customer feedback (further discussed in Chapter 3).

Eastman (2007) engages if/how postsecondary education can pursue entrepreneurialism without compromising core values in the Canadian context of reduced funding over the last two generations. She juxtaposes private education, which has no need to invest in research, against public education, which has research as part of its *raison d'être*. Eastman notes a difference in values between administrators, who value market capital, and faculty members, who value academic or cultural capital, thus

creating competition in values. Within the context of Bourdieu's (1984) work on cultural production, Eastman discusses various benefits and costs of mass production in postsecondary education in Canada. (For greater detail, see Chapter 2)

Poon (2013) identifies a significant relationship between blended learning, student learning experiences, and ultimate achievement. She examines the benefits and challenges of blended learning showing cost, resource, flexibility, retention, autonomy, reflection, and student satisfaction as benefits, while denoting the expectations, implementation, invasive technologies, and developing new skills as challenges. It is important to contrast Poon's findings for the need for social interaction in blended learning, with neoliberal asynchronous online education which further resembles correspondence education and lacks social presence and social capital (Snart, 2010).

Snart (2010) has detailed the organizational and personal challenges to hybrid and blended learning, from early adopters to recent trends. He differentiates synchronous and asynchronous education and contextualizes them in culture and history. He also provides warnings through examples from the history of correspondence education and the need for social interaction in education. Through case study descriptions, Snart suggests instructors need to be the arbiters of which technology is used. For the purposes of AAA learning, it is the role of cheerleaders, who are specialized advocates (Bolman & Deal, 2013), to convince other instructors of the efficacy of AAA learning, not for administrators to mandate the specific uses of educational technology.

***Competing Values Research.*** Conflict among values is almost a cliché when discussing leadership within institutions. The institution in question has competing interests between, on the one hand, an organizational consensus amongst administrators,

innovators and students and, on the other hand, the faculty members who are trying to resist neoliberal policies. With competing values in the organization, a model is needed that reflects this. An updated, information technology planning specific, version (Yang & Melitski, 2007) of Quinn's (1983) competing values framework is used to analyze the organization to seek beneficial situations for all stakeholders amongst and between different value groups (see Chapter 2). The goal is not for students or faculty members to adopt the neoliberal values of administrators or vice versa; rather, it is to find common ground upon which all groups agree so that all stakeholders adopt AAA learning as both an institutional opportunity and a student right. This takes developing consensus through stakeholders responding to others' values, not only their own.

The history of values research has often focused on changing others' values to one's own rather than on finding common ground. For example, models like 'values clarification' (Kirschenbaum, Harmin, Howe & Simon, 1977) and 'combining hybrid value systems' (Winter & Bolden, 2016), among others, focus on advocating personal convictions. Liu (2015) argues these models are essentialist to seeing the individual as dominant and ignoring human relations. What is unique about a competing values model is that it does not seek to change anyone's values or ask anyone to adopt a different value system. Rather, the competing values model finds common ground amongst and between competing systems so that disparate groups will take ownership within their own value system. A competing values model shares relational leadership's criticism of traditional leadership models which consider leaders as distributing authority to followers with leaders as the agents of change. Conversely, competing values research and relational leadership approach leadership dialogically, believing multiple constructs of leaders and

leadership exist simultaneously. Liu analyzes leadership from social constructivist and relational perspectives, emerging “from the interplay between shifting constructions of ‘leaders’ and ‘followers’” (p. 5). Much like the Lean management system (Emiliani, 2015) which the institution follows, the central question is how AAA learning benefits administrators, faculty members, students and innovators.

Administrators advocate for the Lean management system. Emiliani (2015) considers the Lean management system a progressive approach to scientific management through a dialogical lens. Lean emphasizes the use of the scientific method to make gains in efficiency showing how resources could be better allocated and utilized. It purports to value the human side of leadership and efficiency without Taylor’s scientific management, which is more dystopian in nature. Lean differs from Taylorism by not viewing management as a zero-sum game. However, Lean is most certainly a neoliberal method, which focuses on economic costs and depleting budgets, while subordinating the institutional processes in favour of its economic resources. This, in turn, runs into conflict with faculty members who do not consider education as existing solely to serve market forces (see Chapter 2).

***Conscientization.*** Freire (1968) contends that humanization is the true vocation of the individual which he calls conscientization. Dehumanization is the result of a hegemony of “an unjust order that engenders violence in the oppressors, which in turn dehumanizes the oppressed” (p. 44). To Freire, people need a critical understanding of their reality, decoding themselves as subjects, a generative theme in the “human-world relationship” (p. 106). People exist inside a situation (*situationality*), as Freire puts it, “...rooted in temporal-spatial conditions which mark them and which they also mark” (p.

109). Freire calls those who lead people through conscientization *investigators*.

Conscientization is similar to concepts like self-actualization (Maslow, 1943) and praxis (Arendt, 2002). For the purposes of this OIP, these terms are used interchangeably.

***Forms of Capital.*** Those who value cultural and social capital resist the neoliberal definition of leadership. Villeval (2008) discusses the necessity for empowerment as a change concept within the context of non-governmental organizations (NGOs). He considers the need for Freire's (1968) concept of conscientization in the international disability and gay rights movements, describing how networking can form social movements and looking at what organizations are and how they work in a liberation education context. Villeval argues from the perspective of an NGO, claiming that empowerment of local communities is essential in social and economic change and builds on the need for liberation, conscientization and democratic education argued for by Hannah Arendt (2002), Paulo Freire (1968) and Giroux (2013; 2014). Villeval supports leadership in AAA learning by adding the students' need for social capital to Eastman's (2007) discussion of Bourdieu, which contextualizes the administrators' need for market capital and faculty members' need for cultural capital.

Snart (2010) argues the lack of a social environment for students in correspondence and some online education models led to their failure. AAA learning allows students who may not normally be able to access social networks due to their life circumstances an opportunity to join, or enhance, social networks, providing "...greater audiences regardless of their personal and social conditions" (Simsek, 2015, p. 133). As well, Villeval's contextualization of conscientization in the gay rights and disability movements builds on Freire's liberation model and relates directly to the students at risk



and at the margins in the institution under discussion because of their disabilities or marginalization. In order to understand the institution's role in liberation the institution itself must be considered through multiple frames of analysis.

**Four Frames Analysis.** Bolman and Deal's (2013) reframing is a beneficial method to examine the central issue of steering leadership in educational technology from physical infrastructure toward a well-defined classroom direction that is focused on andragogical and democratic principles. This is not to impose one specific lens, but to build toward a culture of AAA learning focused upon andragogy and democracy, defined by stakeholders' values. The institution is therefore analyzed using four separate frames: structural, political, human resource, and symbolic.

*Structural Frame.* Several structures can be seen interacting simultaneously in the institution. Within the structural frame, the institution can be described as a divisionalized bureaucracy, which Henry Mintzberg (1980) describes as "not so much a complete structure as the superimposition of one structure on others" (p. 338). However, any organization with many component parts could be described as a professional bureaucracy, which Mintzberg states has "a coordinating mechanism that allows for decentralization" (p. 336), such as the standardization of skills. From department to department, enclave to enclave, various team configurations abound, from heavy centralization in one-boss structures to looser structures like all-channel networks.

In terms of educational technology, the institution works more like an adhocracy, with many silos and competing interests, which to Mintzberg (1980) is more organic, less hierarchical, and more task-based in its orientation. An adhocracy brings together experts from different fields with little focus on the formalization of behavioural norms, giving

“quasi-formal authority to staff personnel” (p. 338). Bolman and Deal (2013) describe adhocracy as a form to reconcile silos and competing interests.

The objectives of infrastructure development are disjointed between physical and academic needs. Physical infrastructure is generally uniform as it is centralized within the leadership of an information technology department. However, academic infrastructure has far more competition between information technology’s support of the LMS, learning support services, campus bookstore, PD, the online learning division, as well as all the academic departments. Leadership is needed to bring these units together to work toward the stated organizational goal of moving to AAA learning, while highlighting selected educational technologies that support selected pedagogical techniques that support this delivery model. Christie and Jurado (2009) and Driscoll (2002) argue pedagogy often lives in silos as instructors form teaching habits that calcify and information sharing networks are difficult to develop which makes the dissemination of innovation challenging to achieve. It is therefore essential that administrators champion a specific direction in educational technology. This direction can be built through an all-channel network, which tends to share power equally (Bolman & Deal, 2013), so consultation and support are maximized.

***Political Frame.*** The sharing of power is central for success within the political frame (Bolman & Deal, 2013). Foucault (1977) reminds us of the pervasiveness of power, which is not necessarily a negative, yet coercion and suspicion abound. Bolman and Deal argue that organizations are coalitions with enduring differences around scarce resources which put actors into conflict, leading to bargaining “...among competing stakeholders jockeying for their own interests” (p. 195). The exact direction of AAA learning should

not be the critical concern of leadership; rather the focus must be on not getting sidetracked. It is not the objective of this OIP to prescribe one pedagogy in AAA learning; there are many ways to accomplish this. Actors coming together to coalesce around a direction that will involve the bargaining, negotiating and jockeying that Bolman and Deal discuss is the primary concept. Not everyone will agree, but the forming of an alliance toward AAA learning is key, as “Getting things done in an organization involves working through a complex network of individuals and groups” (Bolman & Deal, p. 204).

***Human Resources Frame.*** Implementing AAA learning requires strategic investment in pedagogical cohesion amongst faculty members and support staff within the human resources frame. In order to have specific technologies that support an academic direction, an organization needs said academic direction in the first place. Theory-in-Use workers follow a pattern of behaviour to protect themselves and avoid directly addressing core issues and problems (Bolman and Deal, 2013). Advocacy and Inquiry workers emphasize common goals, communicate openly and combine advocacy with inquiry. It would be unsound to believe that leadership can change the theory-in-use workers en masse. However, collecting the advocacy and inquiry workers together to form the main tenets of a pedagogical direction aiding AAA learning, and the supports needed in educational technology to boost said direction, is a practical outcome. As the direction has already been determined to move to AAA, it is essential to follow up with investment in a “skilled and motivated workplace” as a “powerful source of strategic advantage” (p. 136) in the realm of PD. Driscoll (2002), Eastman (2007) and Poon (2013) argue that a slow process of PD is needed for organizational change in educational technology;

evolutionary change through PD will lead to new cultural norms, although this entails a generational shift.

***Symbolic Frame.*** Bolman and Deal (2013) argue symbolic framing is connected to organizational identity. The institution sees itself as an innovator in digital technology, being the first postsecondary institution in its province to set the goal to adopt 100% e-text and receiving awards for digital innovation. AAA learning must be connected to a digital pedagogical strategy developing an identity in the organization as leaders in pedagogical innovation through educational technology. This will mean aligning the core institutional values not only with AAA learning, but also with symbolic elements such as myths, vision, heroes, stories and fairy tales, as described by Bolman and Deal. The recounting of success stories along the road of organizational change, hopefully producing ritual and ceremony, can maneuver the culture towards an identity as an AAA innovator. In addition to PD that produces enhanced skills in applying educational technology to pedagogy, training as a member of an AAA digital pedagogical innovative culture will also be necessary. This entails involving specialized language, stories, play and humour. Bolman and Deal observe that organizations are theatres, or even cults, and socialization into an identity as a digital innovator will be key to the long term viability of not only one digital pedagogical strategy, but the evolution of a workplace culture to one of digital innovators through AAA learning.

***Holistic Action.*** The institution needs to take holistic action to produce a culture of AAA learning, not only with infrastructure, but also in pedagogy that will allow the institution to continue to lead in education throughout the province, Canada, and the world. Infrastructure must not only be physical, but andragogical, symbolic, structural,

political, democratic and humanistic as well, in order to be holistic. The human resources frame looms large in the use of PD, but this can only be established through the sharing of power, structured as an all-channel network, informed by the political and structural frames, yet maintained by establishing a culture through the symbolic frame. Advocacy and inquiry workers must unite to share power in order to create a coalition that will form this culture of digital pedagogical innovation, maintain it through their identity, and bring others in through PD. This unity can be found in an AAA Learning Working Group, whose implementation is further discussed in Chapter 3.

## **Leadership-Focused Vision for Change**

The progression toward AAA learning is the progression toward student choice. Currently, F2F classes possess some online components via the LMS. The desired future state is for students to choose between physical and virtual attendance in class which will bring more comprehensive student choice through AAA learning.

Many faculty members may have a concern for the role of student responsibility in AAA learning. There is naturally a fear that if students can choose virtual attendance, then they will not attend at all or fail to be engaged. This, however, runs counter to the history and philosophy of adult education which emphasizes giving more choices to students (Elias & Merriam, 2005; Selman et al., 1998). There is also the fear of obsolescence but this concern has some flaws (Eastman, 2007).

First, concern for student responsibility assumes that those in physical attendance are already engaged, which they may not be. Second, some students relate and learn better over a digital platform than physical attendance, depending on the subject matter (Poon, 2013; Simsek, 2015; Snart, 2010). Third, F2F students already take responsibility

for their asynchronous online learning through the LMS. Fourth, students who take online courses already take responsibility for their learning.

The concern for student responsibility is not based in fact but in the emotion of fear. Faculty members need to see the lived experience of their colleagues remaining relevant with AAA learning, in order to feel motivated to participate themselves. When one's livelihood is at stake, one looks to self-preservation. In the context of neoliberal education, faculty members are not being paranoid to be concerned about neoliberal attempts to render them obsolete. Online education is being used for neoliberal ends and democratic educators need to use online learning to combat this mindset.

By adopting a competing values model, the goal is for each group to benefit based on what they value, and not force others to adopt new values. Stakeholders do not need to feel they are in a zero-sum game because in AAA learning, everyone benefits. This takes aligning stakeholder values to democratic education through a competing values method.

AAA learning causes an institution to become more democratic. Students with physical and mental disabilities can choose their type of involvement dependent upon their needs. Introverts can participate in less direct ways but still collaborate. Digital natives and digital migrants can exist in an environment of choosing what will best suit their individual needs based on how they understand their learning style and habits (Poon, 2013; Simsek, 2015; Snart, 2010). Students who feel marginalized or have mental health issues can use virtual attendance as a safe space. Everyone has more choices dependent upon individual needs, which seems to be the very nature and definition of democracy.

**The Right to Choose.** Simsek (2015) has identified increasing student enrollment, financial crisis, lack of focus on education, circumventing instructional

design and international partnerships as just some of the issues facing administrators in postsecondary education. Giving students a choice through AAA learning provides greater economic opportunities for the institution under discussion. Students in an AAA program are able to study from anywhere in the world, or on campus, expanding the provincial, national and global reach of programs of study. In doing so, fewer physical demands are made upon campus resources providing the opportunity for financial savings.

**AAA is Reality.** AAA learning is more responsive to real world contexts. Digital natives and migrants live in the AAA world on social media and in their personal and work relationships. The current state of required physical attendance harkens back to 20<sup>th</sup> century realities and has less association with 21<sup>st</sup> century parameters. In the 21<sup>st</sup> century world of flextime and telecommuting, an AAA lifestyle is the norm.

Using AAA learning builds a greater degree of social relationships. Again, many will say that the F2F classroom is more social, but in a world of many digital natives who prefer to communicate through electronic media compared to traditional methods, this conservative view is obsolete according to the literature (Poon, 2013; Simsek, 2015; Snart, 2010). Additionally, this perspective is also outdated for many digital migrants. Some students find it easier to be social F2F, while others prefer to socialize virtually. For example, introverts have less anxiety and learn better using computer based learning systems over F2F interactions (Tlili, Essalmi, Jemni, & Chen, 2016).

AAA learning has the potential to create a more efficient and exceptional community of practice. Despite its advantages, a potential drawback of AAA learning is if it will further ostracize students on the margins of the classroom community. In order

to address this concern, it is necessary to discuss the importance of periphery participation in a community of practice. Hoadley (2012) emphasizes that those joining an educational community need to be able to lurk on the edges through “legitimate peripheral participation” (p. 291) before they feel comfortable enough to join. Many members evolve into communities rather than jump into them. In the physical classroom, verbal communication is usually the only way to participate in a discussion, which can be an obstacle for introverts or those with anxiety about participation. Being able to speak through web-conferencing software or make a written comment allows some participants the ability to join, lurk around or evolve into the community of practice more fully in a way that could not happen F2F. Above all, improving the community of practice emphasizes a constructivist and relational view of education and knowledge that challenges the neoliberal transactional model of asynchronous online education.

Giving students the choice creates more social opportunities depending on the students’ desired mode of communication. Throughout history, institutions and professors have controlled how they believe students ought to be communicating, which is not democratic. The history of adult education in Canada over the last century has seen that trend reversing (Selman et al., 1998). Choice in attendance may seem foreign to a 20<sup>th</sup> century audience, but is apropos to a 21<sup>st</sup> century cohort. When one takes a step back from what has become normal in the 21<sup>st</sup> century, it is the postsecondary classroom that most resembles 20<sup>th</sup> century expectations in comparison to the rest of society.

**In it for the Long Haul.** Adopting AAA learning is a long-term institutional change. While most courses at the institution under discussion actively use the LMS, there are still some which use no educational technology. Slow and steady progress



through PD is key and will build the cheerleaders for AAA learning into pioneers of educational technology. Just like in an election, votes are won with one handshake at a time. AAA pioneers using web-conferencing in their classes can convince individuals one by one, that AAA learning improves classes through their students' quality of learning and overall educational experience. Tracking the number of programs which currently meet the AAA standard, and setting goals for improvement, will make AAA learning an institutional priority and make the term 'anywhere, anytime, anyway' a part of its nomenclature. All of these measures will implant AAA learning into the digital identity of the institution.

## **Organizational Change Readiness**

The institution under discussion has already made the commitment to AAA learning in its Strategic Plan and Provincial Agreement. Additionally, the narrative towards more online choice has been proceeding since the introduction of the LMS in 2000 and subsequently moving learning components online in the LMS. Two programs in the institution are already running as AAA programs. The institution has an identity as a digital leader in its vision statement and wants to continue innovating. There is technology and PD available for web-conferencing in the classroom. The need at this point is to galvanize advocacy and inquiry workers into AAA pioneers.

## **Plan to Communicate Need for Change**

Advocating for AAA learning will be completed through each group's values. Students will have their democratic lens, which values social capital, upheld. Faculty members will have their fears of obsolescence and care of academic integrity validated. Administrators will see the opportunities for economic gain for the institution. Each

group of stakeholders will see how their benefits. This will be a long-term implementation, beginning with the AAA Learning Working Group which is further discussed in Chapter 3.

**Bottom-Up / Top-Down.** Both a top-down and bottom-up approach to moving more fully into AAA learning will be necessary. From the top-down, the executives in charge of information technology and PD will need to agree to track AAA learning and to put resources behind PD. Leaders of the faculty union will need to know AAA learning is not an obsolescence measure. The heads of the student union will need to appreciate the democratic and social opportunities for AAA learning. From the bottom-up, individual AAA pioneers in support services and faculty members will need to demonstrate how they ensure AAA learning and the opportunities it provides. Individuals will need to share their successes in AAA learning.

The digital identity of the organization will need to become entwined with AAA learning through myths, vision, heroes, stories and fairy tales. Formal and informal opportunities to share experience and learn need to be as much a part of PD as the technical and pedagogical training. The same gradual yet consistent process that has fostered a digital identity must engage with AAA learning.

Currently, AAA pioneers and allies already exist. Some executives embrace AAA learning in principle, support staff on several committees advocate for AAA learning, and two programs have become AAA. Upon tracking AAA learning, and publicizing this, awareness of AAA learning will slowly spread throughout the organization. The team already advocating for AAA learning will continue PD, while promoting opportunities to learn and celebrate successes. To begin, managers may be asked to have at least one

course in the AAA format, which will spread capacity institution wide. Once faculty members and students see it in action, many will be attracted to it. This does not mean everyone will come on board immediately. There will be theory-in-use workers who will dismiss AAA learning, but advocacy and inquiry workers will continue their efforts. Sharing success can also provide an opportunity to air grievances. Driscoll (2002), Eastman (2007) and Poon (2013) argue that a slow process of PD is needed for organizational change in educational technology. Patience and continuous movement towards the goal is the pathway to success.

## **Conclusion**

The rapid change of society through technology has brought a 21<sup>st</sup> century lifestyle that is on an anywhere, anytime, anyway basis. However, postsecondary education has yet to adopt these principles. While much technology is used today in postsecondary education, most classrooms resemble more a 20<sup>th</sup> century classroom than the 21<sup>st</sup> society in the realm of choice in student attendance. Students have the right to learn on their terms in an AAA modality. It helps their learning, increases their democracy and expands the reach of the institution. Exactly how to bring stakeholders together with their competing values, and what those values are, is examined in more detail in Chapter 2.

## Chapter 2 Planning and Development

### Introduction

The first chapter of this OIP considered the leadership implications for a Canadian post-secondary institution transitioning to AAA learning in the context of stalled implementation. The purpose of AAA learning is to give students the choice of where, when, and how they learn through the use of educational technology. This second chapter analyzes major stakeholders through a competing values framework to consider how each group values AAA learning through different forms of capital: social, cultural, and economic. The competing values framework analysis finds the organization is relatively united in balancing its values, but that faculty members are the outliers. This chapter also analyzes different solutions for organizational change using AAA. It concludes that web-conferencing in classes needs to be implemented with a greater concern for human relations in order to reconcile the role of IT business capacity.

### Framework for Leading the Change Process

In this OIP, faculty members, students, innovators and administrators comprise the main stakeholders. The competing values framework, originally present by Quinn and Rohrbaugh (1983), purports that each group in an organization has a different set of diverging values, but all sets must be considered for organizational change to take root. While this OIP advocates for democratic and humanistic solutions, it is essential to present qualitative research that neoliberals and quantitative researchers are able to relate to and value. Hence, including a structuralist approach in the mixed-methods is also

crucial. The main theory framing this OIP is the competing values theory through the model of Yang and Melitski (2007).

**An Introduction to Competing Values Research.** The competing values framework creates a four-quadrant analysis of stakeholder values. The framework is dialogical, assuming that groups will differ in their values. For organizational change to occur, the competing values framework provides a system of reconciliation amongst stakeholders to work for congruent organizational goals that remain within each group's value system. For example, when a couple is considering what type of car to purchase, one partner may value safety while the other may value fuel economy. Rather than bicker over whether safety or fuel economy is a superior value, selecting a vehicle that satisfies both is a solution that does not ask one partner to change his or her values.

Rather than building consensus through homogeneous values, the competing values framework assumes an organization will necessarily be heterogeneous. If the various types of stakeholders are working toward the same goal but for different reasons, organizational change is taking place. The competing values framework reveals approximately where the competition of values exists so that value-based conflicts can be resolved in order to implement change.

Tong and Avrey (2015) summarize the last decades of competing values framework research in *Competing Values Framework of Leadership Roles* (Figure 1). Quadrant A presents a conservative and cautious style which maintains the status quo, preserving the reliability of work. Quinn, Faerman, Thompson, McGrath and St. Clair (2010) compare this quadrant to of leadership models like Scientific Management, X-theory, machine bureaucracy and Mintzberg's roles of disseminator and monitor.

Cameron, Quinn, DeGraff and Thakor (2014) view this quadrant with a culture of hierarchy and an orientation of control.

Quadrant B is goal-oriented and more open to change. However, like Quadrant A, it is concerned with organizational structure. Tong and Avery (2015) consider planning and productivity to be the primary values in this arena. Comparable models include pioneer organization and Mintzberg's roles of entrepreneur and resource allocator (Quinn et al., 2010). Cameron et al. (2014) consider this quadrant as having a culture of the market and an orientation of control.

Quadrant C facilitates human relations and, like Quadrant A, is concerned with internal cooperation. However, it directly contrasts with Quadrant B's competitive and task-based style. Tong and Avery (2015) cites values of participatory decision making and teamwork as important to this quadrant. Comparable models include professional bureaucracy, Maslow's hierarchy of needs, Y-theory and Mintzberg's roles of leader and disturbance handler (Quinn et al., 2010). Human relations has a 'clan' culture and an orientation towards collaboration (Cameron et al., 2014).

Quadrant D focuses on innovation and risk-taking, sharing a concern for dynamism and competition with Quadrant B. It also has similar values with Quadrant C such as a concern for openness and responsiveness. Yet, this conflicts with the caution of Quadrant A. The innovator values positive adaption to external problems and sponsoring visionary initiatives (Tong & Avery, 2015). Comparable models include adhocracy and Mintzberg's roles of spokesman, liaison, figurehead and negotiator (Quinn et al., 2010). Cameron et al. (2014) consider innovators as having a culture of adhocracy, discussed

later in this chapter (see Bolman & Deal, 2013; Mintzberg, 1980), and an orientation toward creativity.

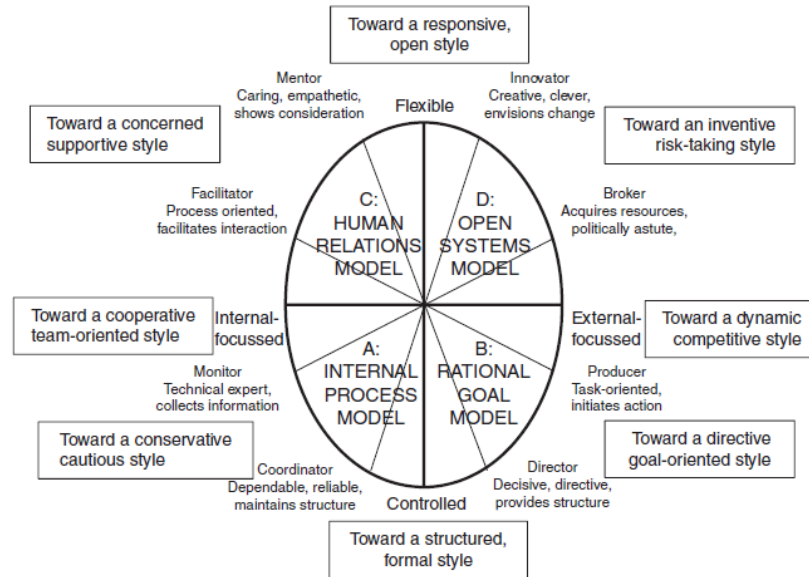


Figure 1. Competing Values Framework of Leadership Roles (Tong & Avrey, 2015, p. 665)

The primary tool in the competing values framework is lexical analysis. By considering key words in organizational documents like strategic plans and other grey literature, the preponderance of certain words in a group’s strategic document reveal the stakeholders’ values. For example, if words like ‘expenditure’ and ‘manage’ occur more frequently than words like ‘democracy’ and ‘empower,’ it implies that the strategic document is oriented towards a fiscal, planning and goal setting framework rather than a human relations framework. Thus the lexical set used is critical for an organization’s analysis depending on what the organization does and what is being analyzed.

The main limitations to a competing values framework is that it does not consult people directly, which can create issues with reliability and generalizability. Quinn and Rohrbaugh (1983) did not argue the tool is empirical or even conclusive from its inception over thirty years ago. Nor does Quinn et al. (2010) or any of their successors

(Venkatraman, 1997; Yang & Melitski, 2007; Tong & Avrey, 2015) argue this today. Rather, they admit that contradictions will arise because several realities can be true simultaneously; the tool is dialogical. The framework sorts competing values, but does not overcome contradictions in values. However, the framework is complimentary to this OIP as the values of stakeholders may be consulted within grey literature without having to conduct research involving human subjects.

The tool makes value choices explicit, but it does not empirically conclude what the values are. While lexis is organized in a quantitative manner, the results remain qualitative in nature, giving a picture of values, but not concluding what they are. Moreover, the competing values framework does not claim scientific reproducibility. In fact, from its inception (Quinn & Rohrbaugh, 1983), scholars have been clear that this is a qualitative, not a quantitative, framework. However, it creates a focal point from which a discussion of values can occur.

**Analytical Framework for IT Strategic Planning.** Quinn and Rohrbaugh (1983) pioneered the Competing Values Framework, Venkatraman (1997) then expanded Quinn's work to include competing values within IT Strategic Planning. Later, Yang and Melitski (2007) built the Analytical Framework for IT Strategic Planning model on Quinn and Venkatraman's original work. Quinn, Venkatraman and Yang and Melitski present effectiveness models juxtaposing internal versus external focus, which can be combined to provide greater depth to a competing values framework specific to educational technology.

This OIP breaks with Quinn's lexical set in order to use a current model focused specifically upon information technology in education. Quinn and Rohrbaugh (1983)



originally used Campbell’s (1977) 30 criteria of effectiveness also applied in both Quinn’s work (Quinn et al., 2010; Quinn, 2014; 2015; 2015), and other scholars (Tong & Arvey, 2015). However, Yang and Melitski (2007) validated a different lexical set specific to the use of information technology strategic planning in the educational environment based on Quinn and Rohrbaugh (1983) and Venkatraman (1997). This updated model, specific to the use of information technology leadership in education, is the most relevant to this OIP. Quinn’s use of Campbell’s 30 criteria of effectiveness is more oriented toward a business model and analyzing entire organizational values rather than Yang and Melitski’s model which focuses specifically upon values relevant to information technology in an educational environment.

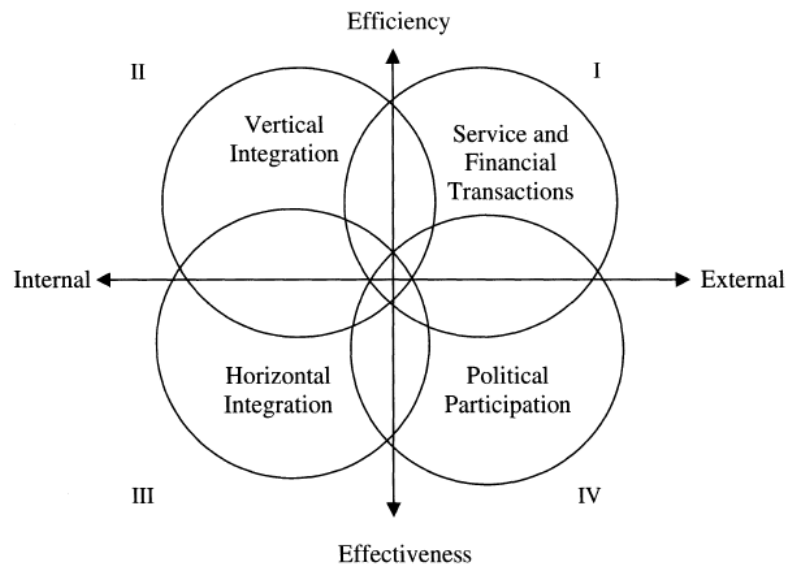


Figure 2. Analytical Framework for IT Strategic Planning (Yang & Melitski, 2007, p. 431)

Yang and Melitski (2007) examined strategic plans and their importance in information technology in ten U.S. jurisdictions. They combined both models of Quinn and Rohrbaugh (1983) and Venkatraman (1997), among others, to refute linear stage planning and embrace a competing values framework, which argues for the coexistence

of seemingly competing values (Figure 2). This study was further validated to include thirty additional U.S. states (Manoharan, Melitski, & Bromberg, 2015). The concurrence of two dimensions, the efficiency orientation versus the effectiveness orientation and the internal orientation versus the external orientation, displays the value orientations in strategic plans.

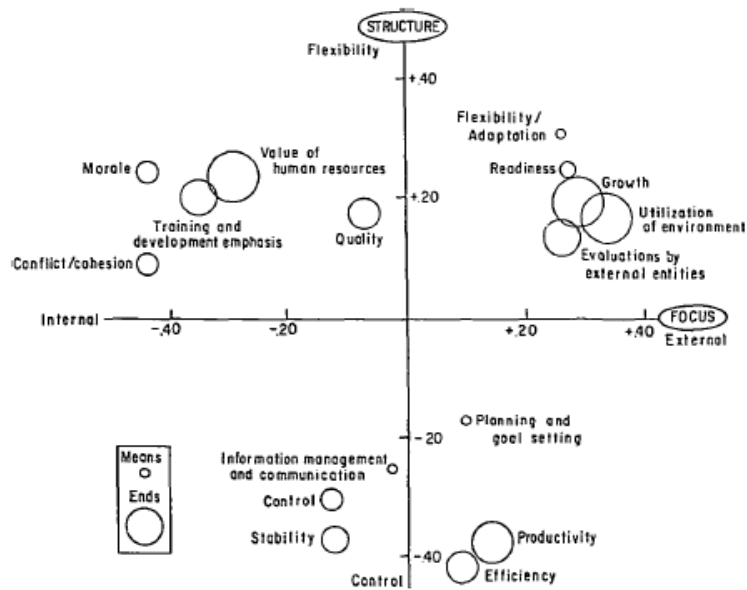


Figure 3. Competing Values Framework (Quinn & Rohrbaugh, 1983, p. 367)

**Competing Values Framework Evolution.** Quinn and Rohrbaugh (1983)

presented a competing values framework (Figure 3) to organizational analysis in the three dimensions of control-flexibility, internal-external orientations and means-ends testing, using Campbell's (1977) 30 criteria of effectiveness which inform what people think is effective and where they fit in the framework. By juxtaposing these dimensions, a spatial model emerges that organizes (1) the effectiveness literature, (2) indicates central concepts to organizational effectiveness, and (3) clarifies the values in which concepts are embedded. Central to a competing values framework is the dialogical notion that several perspectives are all competing yet are all correct.

Quinn and others (Cameron et al., 2014) have enhanced the model to consider secondary dimensions of the framework on the basis of speed and scope of action in the context of culture type and orientation (Figure 4). They present a continuum focusing on the differences between the “new” and the “better” from the upper right to the lower left but also present the differences between long-term and short-term change from the upper left to lower right.

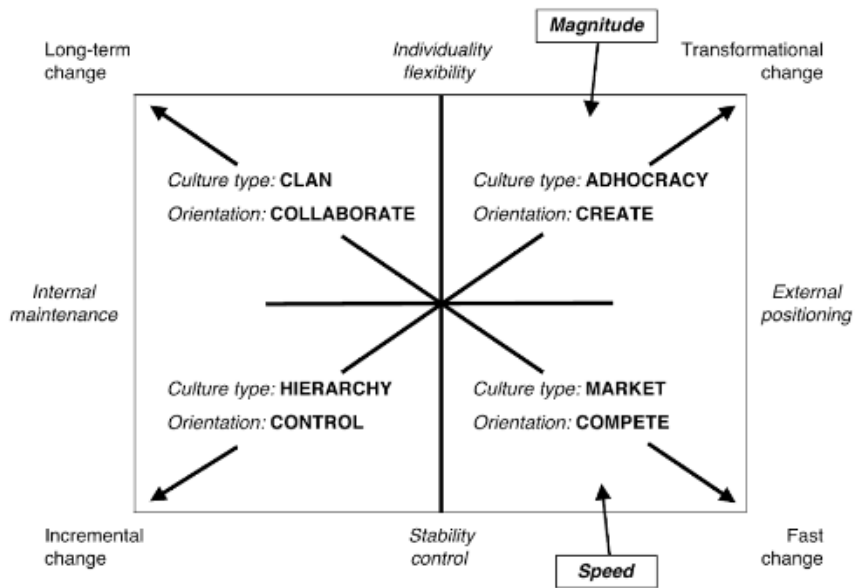


Figure 4. Secondary dimensions of the Competing Values Framework approaches to change (Cameron et al., 2014, p. 13)

Stemming from Quinn and Rohrbaugh (1983), Venkatraman (1997) presented a value center concept that recognizes four interdependent value sources from IT resources (Figure 5). It reframes the dialogue between business managers and their information systems counterparts. The cost center has an operational focus; the service center has a business capacity focus; the investment center has a long-term focus; the profit center considers the external market place. Like Quinn and Rohrbaugh (1983), a multitude of perspectives can be considered in this framework.

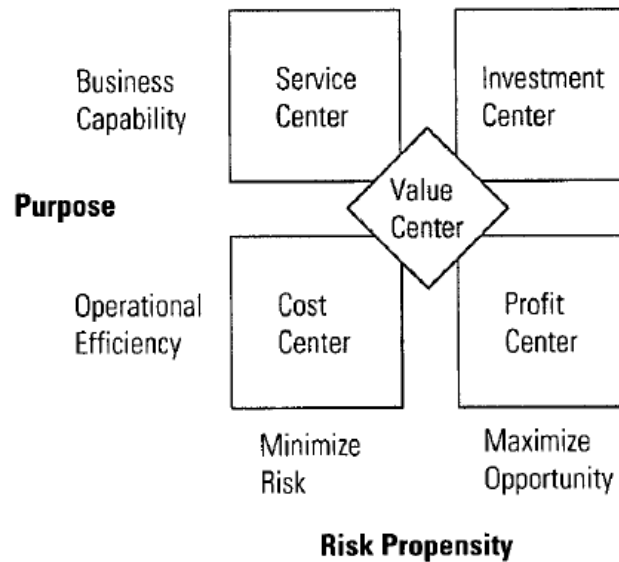


Figure 5. Value Center Concept (Venkatraman, 1997, p. 56)

Similarly to Quinn, subsequent research to Venkatraman's (1997) Value Center Concept has had a strong business focus (Anis, Rasli & Hashim, 2016; Ghezzi & Balocco 2016; Kromberg, 2016) and Venkatraman's specific values-centred research has been about the value of information, not competing values (Venkatraman 1998; 2000; 2008). Other literature stemming from the Value Center Concept has focused on outsourcing (Glickman, Holm, Keating, Pannait & White, 2007; Kakabadse & Kakabadse, 2000; Lecuona & Reitzig, 2014) and the flexibility to change (Gregory, Keil, Muntermann & Mähring, 2015; Obal & Lancioni, 2013). Yang and Melitski (2007) are rather unique in their focus on information technology strategic planning in postsecondary education and using Venkatraman's Value Center Concept.

All three of these models (Figures 2, 3, & 5) show competing values frameworks in four quadrants comparing internal versus external components on the X-axis. Some variation occurs on the Y-axis with Quinn and Rohrbaugh (1983) contrasting flexibility versus control, Venkatraman (1997) opposing risk versus business capability, and Yang and Melitski (2007) juxtaposing efficiency and effectiveness. In this OIP, Yang and

Melitski's framework is used to plot stakeholders' values based on their strategic document lexical analysis.

As the competing values framework is centred in the idea of competition, it is useful to have a framework in which to analyze the nature and variation of competition, especially within the context of postsecondary education. Forms of capital – economic, cultural, and social – has been used in several contexts to analyze competition in postsecondary education and the use of blended learning (Bourdieu, 1984; Eastman, 2007; Villeval, 2008). These provide a value centred analysis which will be explored in the following section.

## **Critical Organizational Analysis**

Traditionally, economic capital has been considered in Marxist analyses. In *Distinction*, Bourdieu (1984) analyzes the specific logic of cultural exchange and expands capital in the context of education: “The primary differences, those which distinguish the major classes of conditions of existence, derive from the overall volume of capital, understood as the set of actually usable resources and powers—economic capital, cultural capital and also social capital” (p. 114). These forms of capital are active in postsecondary education and every set of stakeholder values form capital differently. Literature about blended learning draws this distinction. Eastman (2007) differentiates faculty members from administrators. Faculty members value cultural or academic capital while administrators value economic or market capital. Villeval (2008) explains that students value social capital.

Economic capital is well-known to most people, being focused on the accumulation of financial wealth (surplus value). However, it is necessary to clarify

cultural and social capital. Bourdieu (1984) explains that there are a number of *fields* (Field Theory) in society. When an individual enters one of them, he or she brings along various types of symbolic capital. The individual's symbolic capital is referred to by Bourdieu as *habitus*, based on previous accumulations of different wealth, knowledge, relationships and experience. Each field has its own *doxa*, the rules required to exist in that field. Education is based on students acquiring this *doxa*, which builds earned cultural capital. Once the student has obtained the symbol for his or her cultural capital, in this case a degree or diploma, the student can enter into the membership of social networks (social capital) and thus get a job to earn money (economic capital).

For example, a nursing student at a postsecondary learning institution gains entrance through paying tuition (economic capital) in order to get a nursing degree (cultural capital) which will give certification into a nurses union (social capital) and thus allows the nurse to obtain money (economic capital), respect and prestige (cultural capital) and community membership (social capital). Eastman (2007) argues that in the context of the postsecondary educational institution, administrators are concerned with developing surplus economic capital for the institution, while faculty members are concerned with developing the cultural capital of students. However, Villeval (2008) argues that students are much more concerned with the social capital that the cultural capital will bring them because it is via social capital that students will acquire economic capital.

Bourdieu (1984) also explains the conflict that different forms of capital produce. In order to maintain the hierarchy in the institution, different groups try to maintain and enhance the value of their capital. To sustain the hegemony of one's field, the value of

*doxa* must be maintained and enhanced. This can be done by increasing what is in the habitus, to accumulate more capital, but can also be done by increasing the value of the habitus. This reckons traditional Marxist arguments of commodity fetish and use-value versus exchange-value. Thus, competition inside postsecondary education is not only for different economic, cultural and social resources within the institutional community, it is also a competition for what is valued most between and amongst stakeholders.

Conflict ensues as to the value of forms of capital within the economy of the institution, based on the specific logic of cultural goods (Bourdieu, 1984). For instance, faculty members will argue that academic integrity is of greater value than market principles in order to maintain or enhance their habitus. As long as the value of academic integrity increases then the cultural capital for faculty has been boosted, even if academic integrity itself does not increase. Furthermore, if neoliberal administrators successfully argue for the supremacy of market principles, their economic capital increases without the need to bring in more money. This is because their particular habitus has risen along with the value for their cultural goods. The culture of an individual institution will have its own economy based on how the institution values various forms of capital. This, in turn, leads to an economic competition. The blended learning that AAA learning requires is therefore valued differently in every institution. Therefore an analysis of an institution's competing values is required.

Eastman (2007) notes a difference in values between administrators, who value market capital, and faculty members, who value academic or cultural capital, thus creating competition in values that relates to the competing values framework: economic effectiveness versus cultural effectiveness. The context of cultural versus market capital

is one argued by various scholars combatting neoliberalism (Arendt, 2002; Freire, 1968; Giroux 2013; 2014; Ryan 2012). This OIP is linked to the resistance of neoliberalism by arguing that cultural gains and market gains are not mutually exclusive.

**Hybrid Model.** Adding a materialist analysis based on forms of capital to Yang and Melitski’s (2007) Analytical Framework for IT Strategic Planning creates a hybrid in which the four quadrants are concerned with innovative and social efficiency as well as cultural and economic effectiveness (Figure 6). The model displays what stakeholders value the most, not in general. While one characteristic may be the most highly valued by one group, it does not mean there is no concern for the other characteristics. For example, having the highest concern for innovation does not mean one is unconcerned with social or cultural components. As well, someone can have a penchant for social efficiency in one area, and a tendency toward economic effectiveness in another. The hybrid model is an amalgamation of the principles presented in Quinn and Rohrbaugh (1983), Venkatraman (1997) and Yang and Melitski’s work and forms of capital research (Bourdieu, 1984; Eastman, 2007; Villeval, 2008).

<p><b>Social Efficiency</b>                      internal flexibility                      human relations                      technology’s role in                      business strategy                      service                      students</p>	<p><b>Innovative Efficiency</b>                      flexibility growth                      IT business capability                      investment                      research &amp;                      development                      digital innovators</p>
<p><b>Cultural Effectiveness</b>                      minimizing risk                      maximizing efficiency                      control                      stability                      internal innovation                      faculty members</p>	<p><b>Economic Effectiveness</b>                      planning                      goal setting                      profit                      political participation                      leveraging                      Administrators</p>

Figure 6. Hybrid model



The innovative efficiency quadrant values various forms of capital. It considers the values of flexibility and growth (Quinn & Rohrbaugh, 1983), identification of technology-enabled new business capabilities (Venkatraman, 1997) and streamlining of procedures with stakeholders outside the organization (Yang & Melitski, 2007). Tong and Avery (2015) describe innovators as valuing “positive adaptation to external disruption, creative ideation and experimentation” (p. 666). Tong and Avery also argue that innovators can act as brokers who leverage political and network capital for visionary projects and initiatives. One significant difference from the other groups of stakeholders is that innovators are most concerned with “creative innovation” (Tong & Avery, p. 666).

The social efficiency quadrant mainly values social capital because of its focus on human relations. It considers internal flexibility and human relations (Quinn & Rohrbaugh, 1983), understanding technology’s role in business strategy (Venkatraman, 1997) and breaking down boundaries in IT integration (Yang & Melitski, 2007). Villeval (2008) explains students concern for social capital, which situates them as valuing social efficiency, concerning themselves mostly with human relations.

The cultural effectiveness quadrant derives its value from cultural capital because of its focus on maintaining cultural norms. It seeks to minimize risk and maximize efficiency (Venkatraman, 1997), focuses on control and stability (Quinn & Rohrbaugh, 2003), and concentrates on internal innovation (Yang & Melitski, 2007). Eastman (2007) has explained how faculty members value cultural capital in postsecondary education, which positions faculty members as valuing cultural effectiveness because of their management of academic integrity.

The economic effectiveness quadrant values economic capital because of its market focus. It encompasses planning, goal setting and profit (Quinn & Rohrbaugh, 1983), political participation (Yang & Melitski, 2007), and leveraging organizational resources outside the organization competitively (Venkatraman, 1997). Eastman (2007) argues that administrators in postsecondary education in Canada look to financial concerns, which situates administrators in the economic effectiveness quadrant, considering issues of financial management and standards imposed by provincial governments.

Implementing AAA learning means having stakeholders value students' ability to get their education on an AAA basis. As it is difficult to try to change people's values, it is likely that this is one of the primary reasons behind why implementation of AAA learning has stalled for years. All stakeholders must grasp the value of AAA learning through their own lens. Hence, change must be advocated through stakeholders' existing values, in order for everyone to see it is possible to benefit on their terms but not to the exclusion of others.

**Competing Values Analysis.** In order to understand the competing values of faculty members, students, innovators, and administrators, Yang and Melitski's (2007) analytical model for competing values in the strategic planning process was used (see Appendix A for raw data) because it is (a) an amalgamation of previous competing values models, (b) current, and (c) specifically relates to education and technology. The model considers 65 key words vetted by researchers and the results presented by Yang and Melitski are grouped into four lexical sets contrasting internal processes versus external processes on the x-axis and efficiency versus effectiveness on the y-axis (Figure 2).

The competing values framework requires that lexical analysis be performed on the most important documents to an organization. In this context, it is imperative to ask what the constitutional document is for each group. The label 'constitutional' refers to a document superseding all other documents to the stakeholder group. The institution's strategic plan was used to represent administrators, the faculty collective agreement to represent faculty members, student association by-laws to represent students, and the institution's digital plan to represent innovators. These documents were chosen because they hold constitutional authority over all guiding documents of each stakeholder group.

In the culture of the organization, when one speaks with administrators, contextualizing ideas within the strategic plan forces administrators to argue within the plan and not contravene it, thereby giving a superseding authority. Similarly, arguing with faculty members against the collective agreement closes doors on discussions in the organization. Student Association leadership discusses their need to follow their by-laws in any new initiative. New IT ideas are vetted through the digital plan. While these documents are not the only consideration, it is within the context of these documents that groups decide whether or not to agree to new initiatives.

Each axis in the framework represents a different orientation (Yang & Melitski, 2007). A focus on externality represents a task based orientation, while internality focuses on stability. The effectiveness dimension is more focused on making sure existing structures work well, while efficiency is more about expansion. Although most stakeholders value all of these orientations at some level, the framework reveals what stakeholder groups value most.

There are some important limitations to consider within this analysis. First, this framework is not scientific or meant to be reproducible. Rather, it is a framework by which a picture of values within the organization may be formed in order to have a fruitful discussion of how they function inside the organization's values economy. Second, this analysis does not show to what degree any stakeholder group adheres to its constitutional document; it is only an analysis of purported belief. Third, while a broader analysis of stakeholder documents could have been undertaken, it was not the chosen direction because the documents selected possess the constitutional authority for each stakeholder group. Other documents could not be weighted proportionately and it would be impossible to validate such a process. Once again, this method is not meant to be scientific, so validity and reliability measures are not absolute; however, the Yang and Melitski (2007) model presents a picture in which to discuss institutional values.

The Institutional Result (Figure 7 & Table 1) shows the plotting of each stakeholder group using the Yang and Melitski (2007) framework. Based on this analysis, there is relative unity amongst administrators, students and innovators but faculty members are outliers. In terms of internality versus externality, administrators are only separated from innovators by 0.13 and from students by 0.44 on the x-axis, while being separated from faculty members by 0.64 on the x-axis. This implies students value stability the most, while faculty members are more task-based. However, administrators and innovators fall in the middle of these two orientations (Yang & Melitski).

In terms of equilibrium between efficiency and effectiveness, administrators, innovators, and students are almost equally balanced. Administrators are separated from

students by only 0.05 on the y-axis, and innovators by 0.19. However, administrators are separated from faculty members by 0.69 on the y-axis.

While faculty members lie solely in the economic effectiveness quadrant, administrators, students, and innovators can be seen as having an organizational consensus different from faculty members, as all three lie inside of the innovative efficiency and economic effectiveness quadrants. When these three groups are considered as a whole, they are separated from faculty members by 0.74 on the x-axis and 0.61 on the y-axis. This implies faculty members are most concerned with making sure existing structures work well, while students, innovators and faculty members are balanced between expansion and maintenance of existing structures. The following sections consider each stakeholder group more closely in light of these results.

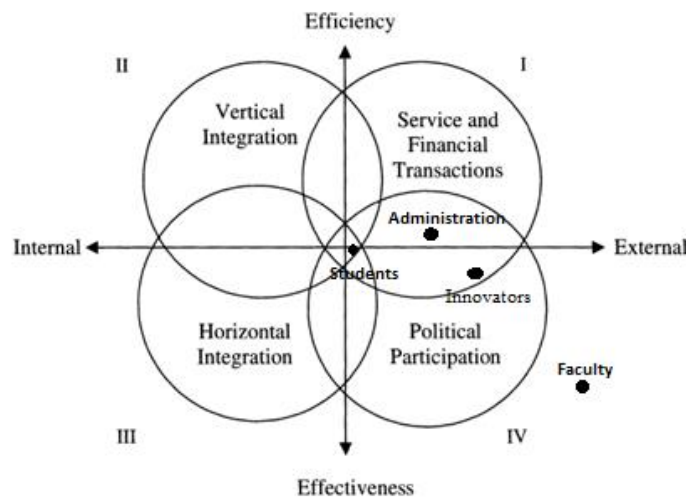


Figure 7. Institution result

Table 1

*Institution result data*

	<i>Administrators</i>	<i>Faculty</i>	<i>Students</i>	<i>Innovators</i>
External	1.13	2.14	0.02	0.68
Internal	0.77	1.15	0.10	0.19
Efficiency	0.56	0.54	0.13	0.12
Effectiveness	0.52	1.19	0.14	0.27
Internal/External	0.36	1.00	-0.08	0.49
Efficiency/Effectiveness	0.04	-0.65	-0.01	-0.15

**Administrators.** Administrators value externality, but are balanced between innovative efficiency and economic effectiveness within the Venn diagram. Administrators are at 0.36 toward externality on the x-axis but almost even on the y-axis at 0.04 (Table 1). The original hypothesis was that administrators would be based in the fourth quadrant valuing economic effectiveness, as administrators are often judged within neoliberal expectations of economic capital (Eastman, 2007; Giroux, 2014; Ryan, 2012). Yet, this group is close to the fourth quadrant within the analysis suggesting administrators balance economic capital with innovation. It is important to question whether these presented values are in fact the lived values, which is a consideration of implementation in Chapter 3.

Administrators have a stronger pull towards externality than students have. However, faculty members look externally to a higher degree than either students or administrators. Additionally, faculty members are far more directed to effectiveness while students and administrators are balanced between effectiveness and efficiency. This suggests that students and administrators could cooperate on new strategic initiatives in educational technology more easily than with faculty members. Quinn and Rohrbaugh (1983) discuss the y-axis as control versus innovation, Venkatraman (1997) as risk versus

business capability, Yang and Melitski (2007) as efficiency and effectiveness and Tong and Avery (2015) as control versus flexibility. The results suggest that while administrators and students balance control versus innovation and other y-axis characteristics, faculty members strongly value control, business capacity and effectiveness. Quinn and Rohrbaugh also argue that a focus on externality represents a task based orientation, while internality focuses on stability. The results show students balancing stability versus tasks, administrators valuing tasks more than students, but faculty members are dramatically weighted more towards a task-based orientation.

Administrators value economic effectiveness as it is judged in neoliberal terms (Eastman, 2007; Giroux, 2014; Ryan, 2012). Quinn and Rohrbaugh (1983) indicate that groups which fall within this quadrant seek to acquire resources with a focus on competitiveness, planning, goal setting, productivity and efficiency.

Venkatraman (1997) provides the moniker “Profit Center” for the economic effectiveness quadrant (Figure 5), with a focus on “delivering IT products and services in the external market place” (p. 54). In this respect, administrators see AAA learning as an IT business product, thereby standing in direct opposition to human relations as diagonal quadrants are opposites in the competing values framework (Cameron et al., 2014; Tong & Avery, 2015).

Thus, administrators, who possess market values toward social, cultural and political contexts, run into opposition with democratic educators focused on the common good from a humanistic perspective (Giroux, 2013). Neoliberalism dictates a culture of positivism which asserts everything is scientifically countable excluding several qualitative questions from the Humanities and Social Sciences (Kincheloe, 1999). Ryan

(2012) has discussed how marketplace practices have marginalized students “from being integrated into common cultural processes like education” (p. 19), excluded through racism, sexism, classism and homophobia, rendering them at the margins of society. Yang and Melitski (2007) found that the further the integration of e-government initiatives were integrated into strategic planning, the greater the emphasis on economic effectiveness, thus bringing neoliberalism’s marketplace objectives into postsecondary institutions.

The view that online learning is an IT product is emblematic of administrators’ neoliberal orientation. The institution under discussion currently has a separate centre for online learning which offers programs of study almost entirely asynchronously online. Administration has barred full-time faculty members from teaching in these programs which reduces the influence of the faculty union in online pedagogy. This allows massive registration for online courses which requires a single ‘facilitator,’ paid below adjunct status, and greatly reduces the synchronous student-centred learning necessary for many learning tasks, despite the fact that social presence increases the quality of online education (Duarte & Snyder, 2006; Poon, 2013; Yamada, 2007). Snart (2010) argues that the lack of social presence was a major failing in the correspondence education movement and those failures can extend to asynchronous online education. Additionally, Snart argues instructors need to be the arbiters of which types of technology are used, precisely because it is connected to the faculty member’s philosophy of education.

Hence, the neoliberal use of exclusive asynchronous online learning necessitates a standardized philosophy of education. This format of learning is a knowledge transfer system like Banking Education, which Freire (1968) describes as seeing students as bank



accounts and education as making deposits in these accounts; there are no experiential or constructivist components. Hoadley (2012) juxtaposes the cognitive view, “a property of individuals and the representations in their heads” with the situated view, “a more relational property of individuals in context and in interaction with one another” (p. 288). Neoliberalism considers education as transactional, while faculty members see education as relational, embedded in cultural practices.

**Faculty members.** The competing values framework addresses the issue of balance as another layer of complexity in working with other stakeholders (Quinn & Rohrbaugh, 1983; Cameron et al., 2014; Tong & Avery, 2015). The raw data (Table 1) of the competing values analysis shows that faculty members are concerned with all four quadrants, tying or exceeding other stakeholders in each dimension. However, external effectiveness is of the deepest concern to faculty members. For example, on the x-axis, faculty members’ orientation toward internality is 1.15, greater than administrators’ orientation of 0.77; however, faculty members have a stronger concern regarding externality at 2.14, compared to administrators at 1.13. From this, one can extrapolate that faculty members, like all other stakeholders, value stability within the internal orientation but faculty members have a much stronger concern for task-based issues considering their external orientation. Likewise, on the y-axis, faculty members value expansion with a 0.54 orientation toward effectiveness, almost the same as administrators who are at 0.56; however, faculty members have strong values towards efficiency with an orientation of 1.19 compared to administrators’ 0.52. This implies that faculty members want innovation and expansion, but are more deeply concerned with task-based issues and making certain the institution operates effectively. Cameron et al.’s (2014) model

suggests that the speed of change and competitiveness of the environment can play a role in faculty members being utmost concerned with effectiveness. This implies the speed of change should be a consideration in reconciling faculty members with the organizational consensus.

Since its inception (Quinn & Rohrbaugh, 1983), the competing values model has found that “organizations that are able to best balance integration and differentiation are also the most effective systems” (p. 371). As discussed in the section on administrators, results suggest that while administrators, innovators and students balance control versus innovation, faculty members strongly value control, business capacity and effectiveness. Based on competing values mapping, students, innovators and administrators are interested in balancing orientations, while faculty members have distinct priorities in the external effectiveness quadrant. This is certainly not to imply that faculty members are not interested in balancing values. Rather, they value externality and effectiveness more than internality and efficiency, while the organizational consensus balances all four orientations. The point at this juncture is to find how this contradiction in balancing institutional values can be resolved. To Quinn, the solution usually lies in the diagonal quadrant, in this case social efficiency.

Raw data (Table 1) shows that faculty members are concerned with all four dimensions, but value efficiency the least. In fact, it is less than half of any other dimension. This suggests that faculty members are concerned with bringing students into the marketplace under external effectiveness or traditional means, and not through the innovation of the external efficiency quadrant. This is not a context which emphasizes flexibility and growth. Instead, the stress is on the management of existing resources.

Faculty members mostly come from the professional sphere so they are more concerned with teaching the existing market expectations of employers rather than new initiatives which may or may not bear fruit.

In regards to AAA learning, new IT processes can be seen as a threat to the existing systems currently in place which allow faculty members to relate with external stakeholders on their terms. There is certainly a fear of obsolescence, which Eastman (2007) and Ward (2016) have noted is a broad concern for faculty members in terms of innovation in educational technology, but also a consideration for impacting market based research, rapid learning and confidence building (Venkatraman, 1997). Hence, the juxtaposition of faculty members fighting for external efficiency while administrators and students strive for balance.

Faculty members, like administrators, see educational technology and AAA learning as an IT product. Yet, while administrators embrace this notion, faculty members work against it in their fear of obsolescence of being replaced by machines and automation (Eastman, 2007; Ward, 2016). Snart (2010) has discussed the confusion about synchronicity in online learning noting that most faculty members, administrators, and students assume online learning is asynchronous. This presents the idea that a teacher can be removed, making it a financial savings to administrators, a threat to teachers, and a loss of social presence to students. This is the institution's current direction in online learning in using 'facilitators.' In order to leverage the support of the faculty union, the union local needs to be approached about the humanistic ends of AAA learning so that there is not any confusion between it and the neoliberal online learning model.

There are challenges to training faculty members effectively in new methods. Driscoll (2002), Eastman and Poon (2013) argue that PD can occur gradually dependent on the organizational culture. Cameron et al. (2014) consider the speed of change in the social efficiency quadrant to be much slower, with a focus on "...sustainability and qualitative improvement" (p. 23). Christie and Jurado (2009) argue leadership is needed from administrators to support investment in the PD of faculty members and students in blended learning. Poon argues there is a significant relationship between blended learning, student learning experiences, and ultimate achievement. However, this is not only in terms of blended learning or AAA learning, but the IT direction in general. In being a 'digital institution,' faculty members see information technology as a threat to their livelihood and feel the administrators see them as cogs in a machine, or worse, they will become obsolete. The road to balance lies in the diagonally opposed quadrant (Cameron et al., 2014; Quinn & Rohrbaugh, 1983) of social efficiency, in which liberation can be achieved.

Political participation is a key element in the economic effectiveness quadrant. Political action through critical theory is needed in order to replace neoliberalism and create a democratic formative culture. Giroux (2013; 2014) has catalogued how neoliberalism represents corporate values, ideology and power. Moreover, it is deconstructing democratic institutions and their foundation of critical engagement and the resistance necessary for a democratic formative culture. The forces against neoliberalism cannot simply resist it; replacement is necessary. Several scholars argue that replacement must occur through a new democratic system, not the restoration of an old system, in order to combat neoliberalism's focus on individual survival (Bourdieu, 1999; Freire,

1968; Garret, 2010; Giroux; 2013; Hall, 1988). AAA learning can be a tool in a democratic educational culture which focuses on high-level human needs like conscientization (Dantley, 1990; Chimedza & Peters, 2000; Freire, 1972; Montero, 2007; Villeval, 2008) and praxis (Arendt, 1990; 2002).

The goal of using AAA learning for humanization works against the neoliberal value of its use for IT business capacity. Both directives can be pursued and achieved. Administrators will be more greatly drawn to the business capacity, and faculty members will be pulled toward the centre in an effort toward humanization, but they can learn from each other. This is not a compromise scenario, rather a dialogical solution, which resolves competing values and brings neoliberals into humanization.

**Students.** Students are balanced amongst all four quadrants of the competing values graph. They have concerns across the spectrum, but value internal measures more than faculty members, innovators or administrators, giving them a stronger focus on stability. For Quinn and Rohrbaugh (1983), students value the organization as a socio-technical system, which emphasizes the interaction of people and technology. To Yang and Melitski (2007), this shows concern with internal management and operation. To Venkatraman (1997), this exhibits the balance of "...the role of IT in today's operations with the requirements in tomorrow's business context" (p. 53). The location of students within all parts of the graph (Figure 7) displays balancing stability with innovation.

Simsek (2015) states how postsecondary education has traditionally been a one size fits all delivery, but that this "...is not acceptable to the generation of digital natives who would like to get their education anywhere, anytime and anyway based on their circumstances" (p. 136). As discussed in Chapter 1, the world now lives on an anywhere,

anytime, anyway basis. While both students and faculty members value stability, students are more open to technological innovation while faculty members are more oriented to effectiveness, considering the risks of modernization (Yang & Melitski, 2007).

Students have a strong concern for social capital which is needed for empowerment and self-determination within society. Empowerment allows students at the margins control over their education and to seek power and direction for themselves. Villevall (2008) argues for the use of different social networking to produce social movements within organizations to help those on the margins. He presents a context in which social capital applies to students in a liberatory and democratic context. Blended learning allows students further control over their education by offering them the choice of physical location and a variety of other social tools that empower students. Regardless of their marginalization, be it disability, introversion, sexual orientation, race, gender, culture, religion or whatever else, a student can engage at the distance he or she feels comfortable. Snart (2010) argues that blended learning also permits students who may not normally be able to access social networks due to their life circumstances, an opportunity to join social networks in a community of practice.

Faculty members are seen as key in this empowerment process, as training of teachers, rather than cutting them, is central to success (Christie & Jurado, 2009; Driscoll, 2002; Snart). The expansion of social capital for students leads to their empowerment, but this requires faculty members to be seen as an asset by administrators, not a liability.

Christie and Jurado (2009), Duarte and Snyder (2006), Driscoll (2002), Snart (2010) and Yamada (2009) have correlated social presence with academic success in online learning while Poon (2013) discovered that academics and students found a range

of challenges and benefits to social presence. On the one hand, these academics identified access to information technology resources and human resources as the greatest challenges. On the other hand, flexibility and the ability to reach various types of students through mixed method delivery were counted as benefits. Poon found students' main concerns were with the amount of social context in the class, preferring more F2F time. Web-conferencing creates social presence in online learning which leads to student academic success.

**Innovators.** The exact identity of innovators can be elusive so it is important to clarify exactly who is being discussed. As the digital strategic plan was used to plot this group, innovators are the cohort that falls under its jurisdiction. This includes most information technology support and management staff, many in curriculum services and PD, various faculty members and administrators who serve on technology committees, as well as the centre for online learning. Of course, innovators are also subject to either the institution's strategic plan or the faculty agreement. However, the document that is paramount in the individual's work life is decisive as to his or her classification.

The digital strategic plan was used to plot innovators in the institution under discussion. Within this context, the innovators are in the economic effectiveness quadrant, but very close to the median and inside of the Venn diagram circle for the external efficiency quadrant. Innovators have a stronger task-based orientation than students or administrators, being located at 0.49 externally; however, innovators balance efficiency and effectiveness being at 0.15 toward effectiveness. Innovators' plot point is closest to administrators, arriving in the same two quadrants. Innovators are also inside the same circle as students, although more extended due to having external concerns.

While innovators are far from the faculty members, they are still in the same quadrant. In fact, they may serve as a bridge between faculty members and administrators as innovators have a stronger pull towards external and effectiveness orientations than administrators.

It is also important to discuss the heterogeneity of innovators. This group includes students, faculty members, support staff and administrators who are specifically concerned with innovation. Support staff is the largest cohort inside the innovator group, but it is incredibly diverse in its origins. However, innovators' plans are still accountable to administrators, and the group does not have the autonomy that students and faculty members possess. Therefore, it is not surprising innovators are so closely related to administrators in their plot point.

Cameron et al. (2014) consider the culture of innovators an adhocracy. Pourezat and Attar (2009) situate adhocracy in the knowledge economy. They describe the necessary migration of organizations towards flexibility, especially in a digital capacity. Moving toward adhocratic structures due to the fading away of "geographic and structural variables" (p. 2) exemplifies the AAA culture in the breaking down of boundaries of where, when, and how people live and work. Additionally, they explain that these changes will require the future of organizations to be flexible and rely on external experts, like scientists, in professional bureaucracies. The principles of flexibility and externality are the orientations of the innovative efficiency quadrant. However, this tendency is influenced by the neoliberal direction to serve market forces.

Innovators being in the fourth quadrant shows the organization's neoliberal direction. Ordinarily, a digital strategic plan would be found in the innovative efficiency



quadrant. While innovators exist inside the first quadrant's concentric circle, they are on the outer edge. This is counterintuitive to Cameron et al. (2014) who see innovators in the innovative efficiency quadrant identifying with "value creation and performance criteria" (p. 20), as well as Tong and Avery (2015) who view innovators as facilitating "...positive adaptation to external disruption, creative ideation, and experimentation" (p. 666). This shows less concern with flexibility and growth, and more with planning, goal setting, profit and leveraging (Quinn and Rohrbaugh, 1983).

To Venkatraman (1997), the innovative efficiency quadrant is the Investment Center (Figure 5) of research and development. However, the innovators are strongly plotted within the Profit Center, which Venkatraman considers having "...a focus on delivering IT products and services in the external marketplace" (p. 56). This implies that innovation in the institution is mainly considered through the lens of neoliberalism's focus on the marketplace.

This analysis also shows the role of IT personnel as helping to maintain the status quo. While the digital strategic plan purports innovation, it seems to be more concerned with the effectiveness of existing procedures than the expansion of new technologies and pedagogies. Making sure the current infrastructure is sound seems the primary concern. This would present the document to be 'theory-in-use' rather than 'advocacy and inquiry' (Bolman and Deal, 2013).

The location of innovators on the graph (Figure 7) could explain one reason why AAA learning has not been implemented. Innovators are concerned with planning, goal setting, profit and leveraging, and not with flexibility and growth. The emphasis on effectiveness makes innovators into digital operatives, making them into theory-in-use.

AAA learning requires flexibility for growth and increase in IT business capacity (Venkatraman, 1997). It is a quintessential idea of the innovative efficiency quadrant (Tong & Avery, 2015). Much like faculty members need human relations solutions to be pulled into the middle, innovators need increased flexibility for digital growth to occur.

## **Possible Solutions to Address Problem of Practice**

There are three possible directions for the institution under discussion to move regarding the implementation of AAA learning. First, it could simply accept the status quo. Second, it could parallel online and F2F learning in its programs of study. Third, the institution could incorporate web-conferencing into its classes to become an AAA institution. Each of the following directions will be analyzed through a discussion of different of forms of capital (Bourdieu, 1984; Eastman 2007; Villeval, 2008).

**Status Quo.** If the institution under discussion accepts the status quo, it will not become an AAA organization. This would be renegeing on the commitment in the Strategic Plan and the agreement with the province. As well, this would impact the identity of the institution as a digital leader in postsecondary education in Canada. Furthermore, the institution would risk lagging behind societal norms, as the culture has become more AAA in its disposition (Simsek, 2015).

From an economic capital perspective, the institution would not expand its IT business capacity (Venkatraman, 1997). There are other initiatives that could expand this, but as society becomes increasingly more digital, the institution would remain bricks and mortar, and not transition into its aspiration of being a digital institution (Pourezat & Attar, 2009). For banks and stores that serve a wide-ranging clientele of different ages, this is less of an issue. For an educational institution, which serves younger people whose

lives are already focused in an AAA direction, the generational changes occur much more rapidly. As other institutions offer programs on an AAA basis, the institution would lose market share over the long-term.

From a cultural capital point of view, the effectiveness of classes would diminish due to the lack of blended learning (Poon, 2013). The students of this era relate to the world on an AAA basis (Simsek, 2015), and teachers can already see less engagement from students in traditional lectures. Culturally, students are becoming less able to relate to 20<sup>th</sup> century formats tied to space and time, making the bricks and mortar classroom a time capsule. As the institution gets left behind by others putting into practice the inevitable AAA learning format (discussed in Chapter 1), the reputation of the institution would degrade and its cultural capital would diminish.

From a social capital viewpoint, students, especially on the margins, would be lost. Villevall (2008) explains that empowerment is lost when there is hesitation in self-determination, emancipation, enablement, and autonomy as these characteristics build social capital. Education is a social experience, and AAA learning brings in the social tools of the 21<sup>st</sup> century into the class. While many might assume a F2F class is more social because of physical presence, it is important to note that physical presence is not the same as social presence (Snart, 2010) and social presence leads to student academic success (Christie & Jurado, 2009; Duarte & Snyder, 2006; Driscoll, 2002; Snart, 2010; Yamada, 2009). Having warm bodies in a room is not important if their minds are not present. Additionally, students having the right to choose how they learn is a democratic principle, and sooner or later, people already living AAA lives will vote with their feet.

**Parallel.** The institution could require every program to run fully online courses parallel with the F2F courses to provide flexibility to students. If the institution parallels online and F2F learning, it will be a pseudo-AAA learning institution, deal with various logistical issues and sacrifice economic, social and cultural capital.

First, this would require greater resources, which runs counter to IT business capacity (Venkatraman, 1997). Running parallel sections will necessitate two sections of every course, which ensures greater expense in human resources. This option may provide a greater reach for the institution, but it will not provide flexibility for students and so will be less marketable to those not interested in an asynchronous online form of correspondence education (Snart, 2010). It is important to note that digital natives have not flocked to online learning; rather, they have sought more flexibility in their learning (Simsek, 2015). This desire for flexibility can be seen in the broader culture as well. For example, commerce has become more flexible, but online shopping has not overtaken and replaced bricks and mortar commerce because society wants options, not relegation to the online format. Students looking for AAA learning are not seeking a purely online program, so it is unlikely a parallel program would attract new clientele.

Socially, parallel sections would give students choice in whether their courses are on campus or not, but it would not solve the issue of students being able to adapt education to their lifestyle and learning style. Discrimination against marginalized students would continue, as physical attendance would still be required. Students would not have the same educational flexibility they experience in other aspects of their lives. Students on the margins would lack the choice for full self-determination, emancipation,

enablement, and autonomy (Villeva, 2008). This results in a pseudo-AAA learning, but not full choice in terms of where, when, and how students learn.

From a cultural or academic capital point of view, students would not have the flexibility to address their learning styles and disabilities that blended learning affords them (Poon, 2013). Students would have choice amongst courses, but not inside courses and lessons. A central tenet to AAA learning is that students can learn objectives where, when, and how they feel they are best suited. Every course has several objectives, so the objectives could not be parsed into students having choice. Students who are semi-local may be less likely to enroll in programs due to a lack of flexibility, thus facing discrimination based on where they live.

**Web-Conferencing.** Web-conferencing in the classroom will create an AAA institution. Asynchronous components are already online in the institution under discussion. The only stumbling block is synchronous classes. If web-conferencing is implemented in the classroom, it will require a large cultural shift in the institution, especially away from a professional bureaucratic structure and toward an adhocracy (Mintzberg, 1980; Pourezzat & Attar, 2009). Instructors will need to run online classes simultaneously inside of F2F classes, and learn new technological and class management skills. However, this need not change their philosophy of education (Poon, 2013; Snart, 2010). PD will need to be expanded to support greater demand.

From an economic capital viewpoint, there is a minimal expense beyond training. The same number of sections can be offered, making web-conferencing superior to a parallel stream method from the perspective of IT business capacity (Venkatraman, 1997). The institution under discussion already licenses software to have an online class

functioning. All that is needed to begin is a webcam with a microphone. A teacher can begin by uploading a PowerPoint into the web-conferencing software and moving slides within the software while projecting it on the screen in the F2F classroom. Students online will be able to participate, seeing the F2F class, being able to ask questions, using the chat feature and speaking from whatever location they may be. If students miss a class, a recording can be viewed within the learning management system. These are all procedures already in place. The main expense is PD, which is key to the implementation of any new educational technology. Several scholars argue a gradual process of PD is the key ingredient for organization change in educational technology (Christie & Jurado, 2009; Poon, 2013; Eastman, 2007; Driscoll, 2002; Snart, 2010).

Web-conferencing provides the most social capital. It is important to reiterate that physical attendance only produces social presence if students are engaged. In adopting web-conferencing as a blended tool for AAA learning, students will have increased flexibility to be engaged and the freedom of choice will be expanded. The student whose mental health does not allow him or her to leave the psychological safety of his or her home can participate. The student whose child has an appointment is able to participate from the waiting room at a doctor's office. The student who lives a great distance from the institution can choose to be part of the F2F class when practical. The student with a physical disability does not need to come on campus every day. The student whose anxiety does not allow interaction with a group of people on some days is still able to join. The student who is an introvert can participate more fully because of the chat feature. The student who has a scheduling conflict can watch the recorded class at a later time. In short, students' education will reflect their lives on an AAA basis.

From a cultural or academic capital point of view, students will be inside of their cultural milieu (Simsek, 2015). Learning in an AAA format, they will be able to benefit from the cost, resource, flexibility, retention, autonomy, reflection, social presence, organization and satisfaction advantages that blended learning brings (Christie & Jurado, 2009; Duarte & Snyder, 2006; Driscoll, 2002; Poon, 2013; Snart, 2010; Yamada, 2009).

The practical reality of implementing web-conferencing in the classroom should not be discounted. This would be a tremendous change in the organizational culture. However, there are already two programs in the institution being offered on an AAA basis through web-conferencing. The institution has already demonstrated the capacity to achieve AAA learning in some form. A slow process of PD can develop organizations through the use of new educational technology (Christie & Jurado, 2009; Poon, 2013; Eastman, 2007; Driscoll, 2002; Snart, 2010). The LMS was introduced in the year 2000 and has still not been universally adopted. However, if one teacher in each program starts using web-conferencing, the message will spread and individuals will take ownership of the process and become pioneers. Advocacy and inquiry workers can create a competing paradigm to the status quo. Once there is a choice, theory-in-use workers will begin to consider new realities. A strategy for implementation should focus on how to turn advocacy and inquiry workers into cheerleaders with administrators supporting PD and disseminating information. This strategy is key to approaching the challenges of leadership.

## **Leadership Approaches to Change**

Considering the three options available, the best solution is to implement web-conferencing in the classroom. First, this provides the maximum economic benefit as

multiple sections are not needed and any program adding web-conferencing would also be available as an online program, hence expanding the reach of the organization and maximizing IT business capacity (Venkatraman, 1997). Second, students would get to choose for themselves which lessons are best F2F, and which are better learned from home. This is especially paramount to students with different learning styles, or disabilities (Poon, 2013; Snart, 2010; Villeval, 2008). Third, students would have access to community in both a F2F and online modality. Web-conferencing provides more authenticity to the real world as work and personal relationships are both F2F and online; this adds education to the modern society in which students participate (Simsek, 2015).

Neoliberalism creates theory-in-use workers (Giroux, 2013; 2014; Ryan, 2012). Due to their need to resist corporate policies of economic expansion and obsolescence, the faculty members are a cohort of theory-in-use. Innovators have become theory-in-use workers focusing on the planning, goal setting and profit determined principles of neoliberalism, rather than the principles of flexibility and growth normally found in the innovative efficiency quadrant. In order to bring the organization into balance, faculty members and innovators need to be brought closer to the administrators' and students' graph position (Figure 7) which means addressing the dominance of neoliberalism in the institution.

However, it is necessary to admit that AAA learning is, in fact, neoliberal. There is a focus on expanding IT business capacity (Venkatraman, 1997), and serving market forces. However, AAA learning can be simultaneously used for democratic education, expanding student choice, helping the marginalized, and bringing those with a neoliberal worldview into the conscientization of conversations about democratic education. This



will assist in challenging neoliberal dominance in the institution and in society (Freire, 1968).

Implementing AAA learning requires strategic investment in pedagogical cohesion amongst faculty members and support staff within the human resources frame (Bolman & Deal, 2013). An organization needs an academic direction before it knows which specific technologies to support. Bolman and Deal argue that theory-in-use workers follow a pattern of behaviour to protect themselves and avoid directly addressing core issues to problems. Those faculty members resisting online learning ought not to be blamed for protecting their livelihood from obsolescence measures. It would be impractical to believe leadership or an OIP can change the theory-in-use workers en masse. However, collecting the advocacy and inquiry workers together to form the main tenets of a pedagogical direction supporting AAA learning, and the supports needed in educational technology to support said direction, is a realistic and viable outcome. Once the direction has been determined, it is essential to follow that up with investment in a skilled and motivated workplace as a powerful source of strategic advantage in the realm of PD. Driscoll (2002), Eastman (2007) and Poon (2013) argue that evolutionary change through PD will lead to new cultural norms.

In the context of educational leadership, Adaptive Leadership presents a model to lead others to self-actualization through conscientization, as well as a model to allow advocacy and inquiry workers to build organization capacity to create new institutional and cultural norms. Heifetz, Grashow, and Linsky (2009) argue the goal of Adaptive Leadership is to encourage people to change and learn new ways of living so they may do well and grow. To Peter Northouse (2015), adaptive leaders are concerned "...with how

people change and adjust to new circumstances” (p. 257). In the use of Adaptive Leadership, Gentile’s (2014; 2015) Giving Voice to Values curriculum provides a platform to implement web-conferencing in a humanized way. Web-conferencing must address the concerns of faculty members, by giving agency to advocacy and inquiry workers. This implementation is discussed in Chapter 3.

## **Conclusion**

The organization has basic unity, but faculty members exist as an outlier stakeholder group primarily concerned about human relations. The remedy involves PD and human resource changes, which can be done through empowering advocacy and inquiry workers. However, faculty members are also deeply concerned with neoliberalism’s dominance in the organization and administrators’ focus on the use of educational technology to increase IT business capacity. Replacing neoliberalism in the organization and society will take the establishment of a democratic formative culture. Through conscientization, leader-investigators open the door to critical understanding of situationality, and bring neoliberals into self-actualization. The so-called common sense of positivism that neoliberalism espouses will be replaced by seeing the objective-problematic situation.

## Chapter 3

# Implementation, Evaluation, and Communication

*If I only I did what I can do, I wouldn't do anything*

(Jacques Derrida as cited in Giroux, 2013, para. 47).

## Introduction

The third chapter of this OIP outlines the implementation, evaluation and communication strategies in AAA education to bring faculty into the organizational consensus. Using Adaptive Leadership (Heifetz et al., 2009), the goals and priorities are explained within the context of implementing AAA learning, but also bringing all stakeholders into conscientization, through a series of interventions that establish a community of practice. Monitoring and evaluation is set in the context of Bolman and Deal's (2013) four frames analysis, which was also used in Chapter 1. Ethical implementation is considered using Gentile's (2014; 2015) Giving Voice to Values (GVV) curriculum to facilitate humanization. Finally, Driscoll's (2002) 10 techniques to implementation and Hoadley's (2012) community of practice models outline the change process communication plan. The ultimate goal is to have an organization that achieves further democracy by implementing AAA learning.

## Change Implementation Plan

During the implementation of any organizational change, it is important to plan success through the appropriate framework. Democratic and technological changes need a constituent-centred model that leader-centric linear stage planning frameworks do not provide (Armenakis and Harris, 2009; Jones and Dirndorfer, 2002; Sang, 2015). In considering changes in educational technology and democratic education, Adaptive

Leadership can sort what has worked from what needs to change from the constituent viewpoint and produce change management in a constituent-centred fashion.

**Goals and Priorities.** Adaptive Leadership (Heifetz et al., 2009) presents two basic challenges: technical and adaptive. Technical challenges are those for which the solution is already known. Adaptive challenges, like the name implies, require some sort of modification. For example, the manager of a computer lab knows to call IT to fix a broken computer. Whether it is an old computer or a tablet that has just been purchased, the solution is technical in nature because the existing solution is tried and true. Teaching a new faculty member to use the software on a desktop would also be an instance of a technical challenge. However, implementing the use of tablets in classrooms in place of having a fixed computer lab would require adaptation on the part of the faculty member, those engaged in training faculty members, as well as the student population. Therefore, new procedures would need to be developed and sacred cows addressed, making it an adaptive challenge. Conscientization (Freire, 1968) challenges people's paradigms and their antiquated technical solutions to situational challenges. AAA education requires moving toward adaptive solutions to the 21<sup>st</sup> century culture and away from the technical challenges of the 20<sup>th</sup> century classroom. Leadership interventions are presented in the context of the six leadership behaviours of Adaptive Leadership.

***Get on the Balcony.*** Heifetz et al. (2009) use the analogy of standing on the balcony and watching ballroom dancers. From this vantage point, one can see the big picture, who is dancing with whom and the manner in which they dance. In order to intervene, the areas of need must be recognized. One first must see where neoliberal policies are taking effect, who is and is not arguing for them, why the neoliberal approach

has been embraced, how its policies are being used and what effect this has had on the humanization of all stakeholders within the organization.

It is also important to consider how and why members of the organization may have become resistant to change, especially in the face of massive technological and social upheaval. Heifetz et al. (2009) discuss how, “Successful people in the middle third or latter half of their careers are being asked to move away from what they know how to do well and risk moving beyond their frontier of competence as they try to respond adaptively to new demands from the client environment” (p. 22). Simsek (2015) points out the specifics behind how society has changed and why millennials are looking for their education on an AAA basis. However, these cultural changes are no less shocking to those embedded with a more traditional mindset, than moving to a foreign country. Change agents need to be aware of the gravity of the changes being proposed, acting accordingly with grace and understanding to others’ traditions and realities.

*Intervention #1: Write the OIP.* Heifetz et al. (2009) contextualize getting on the balcony and being able to speak the unspeakable. The notion of no longer requiring physical attendance is taking on a ‘sacred cow’ of the institution of postsecondary education. There are many concerns about AAA learning that have already been catalogued in previous chapters. Writing this document is an essential part of ‘getting on the balcony.’ Heifetz et al. (2009) suggest generating multiple interpretations. By reframing the organization (Bolman & Deal, 2013), considering different forms of capital (Bourdieu, 1984; Eastman, 2007; Villeval, 2008) and analyzing the organization through its competing values (Yang & Melitski, 2007; Venkatraman, 1997; Quinn & Rohrbaugh,

1983) several realities can be seen working concordantly. This is the first intervention which prepares all other interventions.

*Intervention #2: Form an AAA working group for further interventions.* Diversity is central in establishing a community of practice. Hoadley (2012) summarizes that the basis of knowledge is embedded in cultural practices in theories about communities of practice. Constant (1987) argues that organizational perspectives and systems perspectives limit technological innovation which happens through connected people and tools in a community of practice. Hoadley discusses the metaphor of ‘leaky’ and ‘sticky’ knowledge, that some knowledge lives in silos due to its technical nature being hard to disseminate (sticky) or the knowledge cannot be contained due to its ease of dissemination (leaky). However, practice in a community solves the leaky/sticky issue. Considering the socio-technical issues in implementing AAA learning, as described in Chapter 2, implementation requires the dissemination of embedded cultural practices and a lot of sticky knowledge that only a community of practice is able to share.

Access to experts, common identity and peripheral participation are the key elements of a community of practice (Hoadley, 2012). First, experts need to be available for new members to learn from and pose questions to. New participants must also possess the desire to enter the process necessary to become experts. Second, in order for a new participant to join the common identity of the community of practice, the aforementioned identity must already exist. Third, participation in the community of practice usually starts on the margins of the community and individuals slowly move towards the centre. Hoadley argues that participants “...need to have a space in which it is legitimate to be on the periphery...” (p. 291).

It is vital to the formation of a community of practice that experts come together to form a common identity, which new participants can later join. Hence, the following stakeholder groups will be represented in the formation of this community of practice: faculty members who are teaching in an AAA capacity, technical support staff who are assisting them, administrators from curriculum and professional development supporting AAA learning and students who are learning in the AAA modality. Many in the aforementioned groups have been informally contacted and are willing to participate. The community will meet regularly F2F, including web-conferencing, but will also maintain a social network on the institution's social networking site to allow information dissemination and periphery participation.

It is essential that the AAA Stakeholder Group set its own identity, and that this OIP does not prescribe an identity to the group. This community of practice already has expertise, and one member dictating an agenda will not build community. Joining together in a first meeting to define a mandate for the AAA Learning Working Group and presenting the executive summary from the OIP (Intervention #1) will create the opportunity as a community of practice to define the technical and adaptive challenges which are further discussed in Intervention #3.

***Identify the Adaptive Challenge.*** The second behavior of Adaptive Leadership is to identify the adaptive challenge. It is important to note adaptive challenges are both technical and adaptive in nature. Identifying adaptive challenges means separating the technical parts of challenges from the adaptive parts. There are usually some pre-existing technical solutions to some components, yet other areas need an adaptive response. However, people are not clean slates; they have had some kind of praxis in their lives and

have used educational technology. The human development and professional development of an individual has technical and adaptive components.

There are four archetypes of adaptive change: the gap between espoused values and behavior, competing commitments, speaking the unspeakable and work avoidance (Heifetz et al., 2009). Exploring situationality (Freire, 1968) in these archetypes through critical reflection will make the situation less dense and allow the individual to examine the objective-problematic situation. This also equips the individual with the tools needed to utilize this process within the organization and discover how neoliberalism is operating within these archetypes. Heifetz et al. contend that, “Adaptive challenges can only be addressed through changes in people’s priorities, beliefs, habits and loyalties” (p. 19).

*Intervention #3: Separate adaptive and technical challenges.* It is important for the AAA Stakeholder Group to separate these challenges in order to become a community of practice. Hence, this OIP will not separate these challenges but provide a framework for the community of practice to sort them.

During the initial meeting of the AAA Stakeholders Group, the difference between technical and adaptive challenges will be introduced. Members will be asked to consider the effectiveness of existing academic, social, physical and economic infrastructure and what can be useful for further implementing AAA learning. Members will also be asked what adaptations are necessary for AAA learning to expand.

The agenda of the second AAA Stakeholder Group meeting will be to separate adaptive and technical challenges. By bringing disparate stakeholders together to divide these challenges, the group will begin to form an identity as a community of practice. The community will prioritize which challenges are short, medium and long-term, as well as



decide what needs to be addressed immediately. Through the community's chosen process, solutions to challenges will be discussed and action items dispersed amongst the group. Experts will be given the forum to express their best practices. The unified goal of the Working Group mandate and work on action items will further solidify identity. The openness of the group will give an opportunity for periphery participation. This will help fulfill the access to experts, common identity and peripheral participation that are key elements of a community of practice (Hoadley, 2012).

*Intervention #4: Identify gaps between espoused values and behaviour.* In subsequent meetings of the AAA Stakeholder Group, the four key stakeholder documents will be disseminated: the faculty labour agreement, the strategic plan, the student by-laws and the digital strategic plan. The key questions surrounding this discussion will be (1) in what ways does each group in the institution need to grow in meeting their espoused values found in their core documents? (2) How can AAA learning decrease this gap between espoused values and behaviour? (3) What parts of each document could be useful in advocating for AAA learning?

These questions are designed to engage Adaptive Leadership's four key archetypes: the gap between espoused values and behavior, competing commitments, speaking the unspeakable and work avoidance (Heifetz et al., 2009). These questions will be added to the agenda when the community of practice has coalesced to a point of trust in which facilitation of addressing sacred cows is possible. It is a risk to group cohesion to introduce these questions too early. Cameron et al. (2014), Freire (1968), and Kotter and Schlesinger (2008) emphasize patience is required in humanistic change so that coercion is avoided.

***Regulate Distress.*** As a leader-investigator (Freire, 1968), it is important to regulate distress. This is the third behaviour of Adaptive Leadership. Northouse (2015) mentions that the adaptive leader must help others to recognize the need for change but not become overwhelmed. Heifetz et al. (2009) suggest, on an individual level, a personal ‘holding environment,’ is needed as everyone will need to live in the disequilibrium of adaptive change. Agents need to be free to act, but must also trust that leaders are close at hand to assist and provide cover from the retribution of those resisting change. Heifetz et al. compare a ‘holding environment’ to a child learning to swim or ride a bicycle with a parent near the child. The agent still acts, but is confident with the support of those in authority. Emotional support is critical.

Giroux (2013) and Ryan (2012) argue neoliberalism seeks to make people fear for their security and not speak out in fear of not being promoted or left in financial distress which reduces the individual to the survival level, rather than elevating them to self-actualization. Humanization, as the true vocation of the individual to Freire (1968), combats this anxiety. The fear of obsolescence is a major concern in the implementation of blended learning (Eastman, 2007). In the face of fear, the leader-investigator must be confident and that confidence is contagious.

The anxiety of modernization needs to be acknowledged. Bringing a 21<sup>st</sup> model of AAA education is less dramatic for the student who is already accustomed to that lifestyle, but it is a histrionic difference for those who have been teaching in a 20<sup>th</sup> century modality for the better part of their careers. Therefore, it would be astonishing for long-term faculty members to jump on board the AAA train without any resistance. Add to this the fear that online learning can cause obsolescence, and there is little wonder why

this institution, or any for that matter, has not made this transition. As stated previously, people will resist and react with fear. Freire (1968) calls listening ‘revolutionary action.’ Being non-judgmental and providing emotional security is the key. However, when those who are frightened see innovators not becoming obsolete and students who are more engaged, the challenge of AAA learning simply becomes a technical challenge as a new hill to climb rather than a fight for one’s livelihood.

*Intervention #5: Identify commonly held beliefs in the group.* Developing a common identity is crucial for a community of practice not only for its own cohesion, but also for the existence of an identity to which new members can join. In this intervention, each group member will have the opportunity to share their view of what defines the organization and why they are interested in AAA learning specifically, and postsecondary education in general. This value sharing exercise will serve to bring conflicts into the open and create an atmosphere in which participants have the opportunity to understand one another. This will likely result in some form of disagreement, as predicted by the competing values framework. Therefore respect for individuals will need to be maintained. One goal of this intervention is to destress participants by identifying common ground thus clearing suspicion. Another goal is for participants to identify who the experts are, so that participants know to whom they can go for help and thus creating a holding pattern.

*Intervention #6: Practice sharing beliefs through Giving Voice to Values.* The GVV curriculum gives participants the opportunity to express their values in a safe space before expressing them in other contexts. In this intervention, the AAA Stakeholder Group will roleplay discussions with colleagues using GVV and discuss AAA learning

through their own lens of the institution (Intervention #5) and their concerns about the gaps in the institution between espoused values and behaviour (Intervention #4), in addition to pedagogical and technical aspects.

***Maintain Disciplined Attention.*** Change takes time so it is important to maintain disciplined attention. This is the fourth behaviour of Adaptive Leadership. Rapid change can be very distressing, but moving too slowly can lead to complacency. In discussing Adaptive Leadership, Northouse (2015) encourages us to nudge the “elephant in the room” (p.269), being careful about people avoiding change.

Heifetz et al. (2009) point out that adaptive challenges are often ambiguous and require flexibility. They argue cultural shifts in organizations occur over time and compare them to the adaptive challenges in the evolution of humanity. Evolutionary change through PD will lead to new cultural norms (Driscoll, 2002; Eastman, 2007; Poon, 2013). The pace of humanization (Freire, 1968) and progress in human relations (Cameron et al., 2014) is gradual and implementing AAA learning will be a generational change process.

***Intervention #7: Create a professional development inventory.*** Teaching in an AAA modality is a radical change for most faculty members. Maintaining traditional classroom management techniques while also managing a web-conference adds a new dimension to all aspects of the pedagogical process. It is not the purpose of this OIP to prescribe which PD seminars are necessary; rather, this OIP recommends the AAA Stakeholder Group determine which professional development seminars already exist (technical challenge) and which seminars need to be produced (adaptive challenge). Elias and Merriam (2005) distinguish formal learning contexts such as schools, from informal

learning contexts like professional seminars and nonformal learning contexts like peer-to-peer (P2P) learning. They found that most workplace learning occurs nonformally, outside of formal and informal classrooms, so P2P training will also be addressed by the group. Through this process, the cohesion and identity of the group will be reinforced, and the sense of ownership of the PD offered will be cemented.

While not offering prescriptions, this OIP recommends some research in building strong communities of practice in AAA learning. First, Driscoll's (2002) ten best practices are a robust foundation. Second, Hoadley (2012) argues the need for management of connectivity and institutionalization in the community of practice, through the content, process, and context (CPC) model for facilitators. For educational designers, Hoadley and Kilner (2005) recommend the content, conversation, connections, and information context (C4P) model. Both Hoadley and Driscoll's recommendations are discussed in further detail in the Change Process Communications Plan later in this chapter.

In the context of change management, the plan, do, study, act (PDSA) cycle will be suggested to the community of practice for scientific implementation and monitoring (Moen & Norman, 2009). Park, Takahashi and White (2014) outline a 90-day PDSA cycle for teacher development based in coaching on five principles: safety, objectives, teaching, engagement and learning (SOTEL). Special attention will be paid to (1) iterative cycles of change and (2) scaffolding from small-scale to large scale action. Taylor, McNicholas, Nicolay, Darzi, Bell and Reed (2013) found these were not being respected in many PDSA implementations, which presented a number of problems.

*Intervention #8: Share and track experiences of success and resistance. Bolman*

and Deal (2013) discuss the necessity of sharing myths, vision, heroes, stories and fairy tales in the symbolic frame to create a shared identity. In the agenda of the AAA Stakeholder Group, there will be opportunities to share successes and resistances to build best practices and coalesce group identity. From a tracking standpoint, the structural frame requires specific markers for courses and programs of study using web-conferencing. The political frame concerns itself with the quality AAA learning is bringing to students. The human resource frame tracks the use and development of faculty members' use of web-conferencing. These elements will be reported to the group and administrators as discussed in the Change Process Monitoring and Evaluation section of this chapter.

*Give the work back to the people.* The fifth behaviour of Adaptive Leadership is giving the work back to the people. Heifetz et al. (2009) comment that, "Once you help unleash the energy to deal with an adaptive issue, you cannot control the outcome" (p. 31). The pathway is not a straight line and will have many unpredictable outcomes.

Respecting autonomy is key and in praxis, people will have realizations others may disagree with. Each individual has something different to contribute to a democratic formative culture. In using web-conferencing, which software a class uses, accountability measures of students attending virtually, classroom management concerns and a variety of other variables need to be in the purview of the faculty member, just as they are in a traditional classroom. Academic autonomy does not need to change, nor should it. Diversity is valuable in AAA learning, just as it is in self-actualization.

*Intervention #9: Practice Driscoll's (2002) 10 best practices through GVV.* Much like Intervention #6 (Practice sharing beliefs through Giving Voice to Values), the GVV

curriculum, discussed in more detail in the Leadership Ethics and Organizational Change section of this chapter, will be used to roleplay community members' experiences with Driscoll and Hoadley's (2012) recommendations, as developed in Intervention #7 and shared in Intervention #8. This intervention is rather flexible, as the community may or may not adopt various recommendations from this OIP. Regardless, what the community adopts as best practices in AAA learning will be roleplayed using the GVV curriculum.

*Intervention #10: Practice conscientization through GVV.* Similar to other interventions using the GVV curriculum, community members' own experience with humanistic change using AAA learning will be discussed and conversations will be roleplayed, according to the GVV curriculum, in order for the community of practice members to share their self-actualization experiences of humanization as leader-investigators. Part of the agenda of every meeting will involve some sort of GVV practice based on different interventions.

***Protect Leadership Voices from Below.*** The sixth behavior of Adaptive Leadership is to protect leadership voices from below. Northouse (2015) argues that adaptive leaders must listen and be open to the ideas of those in the group who are on the fringe and marginalized. Those without power risk their security. This is particularly true for part-time employees, yet the fear of obsolescence is paramount for all faculty members, as the competing values analysis in Chapter 2 revealed.

When those who have been humanized challenge neoliberalism, the leader-investigator needs to use his or her position of authority to help protect the individual in whatever way possible. Tenured faculty members need to give cover to adjunct faculty members. Permanent support staff must use their positions to give confidence to part-

time staff. A neoliberal organization does not play nice, and in seeking to establish a democratic formative culture, as Giroux (2013; 2014) has argued, those with power need to protect the less powerful.

Heifetz et al. (2009) describe the power of listening. In an adaptive challenge, people will have profound things to say about a radical idea. These voices need to be heard and honoured. This means providing a safe space for introverts to speak, allowing long pauses in conversations and encouraging them to express their values. For anyone to feel comfortable to do so, they need to be protected in order to communicate frankly and without fear of negative consequence. Like praxis, discussing AAA learning needs to be emotional. Heifetz et al. warn that, "...they will not let you into their hearts if you are not willing to let them into yours" (p. 270).

*Intervention #11: Share needs for assistance, support and protection.* As a diverse community of practice, members of different positions will be able to provide cover for those with less security. Full faculty members will be able to go to the faculty union to relay ideas resistant to criticism and communicate the humanistic direction of AAA learning. Administrators will be able to broach issues that support staff would not have the protection to advocate for, while promoting the humanistic and financial gains AAA learning will bring. On the agenda of each AAA Stakeholder Group meeting, an opportunity will be given for members to voice concerns and ask for protection from those with more security within the institution as well as support from experts.

*Intervention #12: Develop a formal institutional implementation plan for AAA learning.* The scope of this OIP is to create the institutional capacity for AAA learning in order to reach a competing state versus the status quo in which blended learning is



competing with traditional in-class delivery. Once this has been accomplished, a linear stage plan for institution-wide implementation will need to be developed. Considering the breadth of such a task, this will be outside the scope of the AAA Stakeholder Group, and will most likely be a measure headed by executive management. The role of the AAA Stakeholder Group will be to agree when this capacity has been reached, and how best to advocate for institution-wide adoption. This will require the development of a new OIP which will need to be the work of a group of advocates like the AAA Stakeholder Group, and not a single author. Those in positions of authority will need to protect the vulnerable voices from being excluded in the final implementation process. (Table 2 summarizes intervention by leadership behaviour.)

Table 2

*Interventions by leadership behaviour*

Leadership behaviours	Interventions
Get on the Balcony	Intervention #1: Write the OIP Intervention #2: Form an AAA working group for further interventions
Identify the Adaptive Challenge	Intervention #3: Separate adaptive and technical challenges Intervention #4: Identify gaps between espoused values and behaviour
Regulate Distress	Intervention #5: Identify commonly held beliefs in the group Intervention #6: Practice sharing beliefs through Giving Voice to Values
Maintain Disciplined Attention	Intervention #7: Create a professional development inventory Intervention #8: Share and track experiences of success and resistance
Give the work back to the people	Intervention #9: Practice Driscoll's (2002) 10 best practices through GVV Intervention #10: Practice conscientization through GVV
Protect Leadership Voices from Below	Intervention #11: Share needs for assistance, support and protection. Intervention #12: Develop a formal institutional implementation plan for AAA learning.

**Limitations.** This OIP is non-linear which presents challenges to planning and communication. Unlike Lewin's (1947) 3-step or Kotter's (2012) 8-step model, the implementation of AAA learning is not in a straight line. Kang (2015) notes that despite logical sequencing of linear stage planners like Lewin, Kotter and others, 70% of change initiatives are not successful. Armenakis and Harris (2009) comment that these failures are often the result of not focusing on change recipients as also being the agents of change. Mento, Jones and Dirndorfer (2002) suggest that any failure at any stage of these linear models can derail the transformation process. These models are not only strategic and tactical, but are the focus of implementing change management for leaders, rather than the focus for constituents who implement the organizational change. Higgs and Rowland (2005) concluded from their data that leader-centric behaviours, common in linear stage planning, impede implementation. A non-linear analysis of the organization, such as the competing values framework, and a non-linear implementation plan, like Adaptive Leadership and the GVV curriculum, are able to include voices from above and below through an all-channel network.

Through the utilization of the competing values framework, one is automatically rejecting linear stage planning (Venkatraman, 1997). Many faculty members and departments will be in different stages of implementation at the same time, according to their needs and values, working in a web-like format learning from one another. In adaptive leadership terms, technical changes can work in a linear fashion but adaptive changes are more chaotic with different groups of stakeholders working through different parts of the process simultaneously. Heifetz et al. (2009) encourage an attitude of support from leaders, rather than a task-based leadership approach. As well, since implementing

AAA learning includes a focus on humanization, implementing the social efficiency quadrant encourages a collaborative approach (Cameron et al., 2014).

Implementation of AAA learning is a generational change and necessitates a gradual process of professional development to be successful (Christie & Jurado, 2009; Poon, 2013; Eastman, 2007; Driscoll, 2002; Snart, 2010). Kotter and Schlesinger (2008) state, “Efforts that involve a large number of people, but are implemented quickly, usually become either stalled or less participative” (pp. 8-9). Managing expectations about the pace of change will be an important part of this process.

As discussed in Chapter 2, the competing values framework does not consult people directly, which can create issues with reliability and generalizability. Quinn and Rohrbaugh (1983) do not argue the tool is empirical or even conclusive, nor do any of their successors (Cameron et al., 2014; Tong & Avery, 2015; Venkatraman, 1997; Yang & Melitski, 2007); rather, they admit that contradictions will arise because several things can be true at the same time; the tool is dialogical. The model sorts competing values, but does not overcome inherent contradictions in values.

Cawsey, Deszca and Ingols (2015) have reported that the Quinn and Rohrbaugh (1983) model presents a static situation that exists within an organization, rather than dynamic changes over time. It does not encourage longitudinal thinking.

Moreover, defining values within this framework can be seen as restrictive. Indeed, groups of people are not able to fit neatly into boxes and it would be unsound to consider the model a final representation of a group’s or an organization’s values. Quinn and Rohrbaugh (1983) describe the model as an “approach to discovery” (p. 377) that can allow an analysis of different theoretical directions, which this OIP has explored.

Just as Richardson (2007) argues that qualitative research could be considered as a crystal, with numerous angles seeing the object from different perspectives, so too has this OIP tried to consider many angles. Nevertheless, no academic inquiry or conversation is ever closed or complete.

Adaptive Leadership and GVV models are practical leadership tools for implementing AAA learning and democratic education. However, other models are possible and control is not necessarily in the hands of those who initiate change. Heifetz et al. (2009) state that, “Once you help unleash the energy to deal with an adaptive issue, you cannot control the outcome” (p. 31).

## **Change Process Monitoring and Evaluation**

In Chapter 1 of this OIP, Bolman and Deal’s (2013) four frames structure was used to analyze the organization. Monitoring and evaluation will also be considered through this framework: structural, political, human resource, and symbolic. A list of action items for tracking can be found at the end of this section.

**Structural.** The axiom that “what gets measured is what gets done” is often spoken within the organization under discussion. Bowers (2017) has discussed the tendency of data analytics leading to organizational action. Tracking specific events and measureables in any organization gives an issue priority because it becomes observable. In this case, tracking how many programs are AAA and how many use web-conferencing will generate publicity. Stakeholders will feel compelled to ask what AAA education means and how to implement it. They will see who is and who is not utilizing it. In short, tracking puts light on who, when, where and how AAA learning is being undertaken so that the rest of the community of practice can assist in implementation.

There is a culture of consequences for not fulfilling observable goals in the organization under discussion. Managers, departmental chairs and executives all have performance contracts and may be dismissed for not fulfilling these. Having a baseline for AAA learning and then a moderate increase in AAA learning's presence will push forward implementation. In other instances of implementations of educational technology and practices, aligning chairs' performance contracts with implementation goals has resulted in faculty adoption. Requiring chairs to first establish a pilot course in their department to be AAA will create an environment in which the rest of the departmental chairs will become acquainted with AAA learning. It will also create an environment in which every department has at least one faculty member who is well versed in AAA education. In this environment, AAA learning will progress to grow organically.

Humanization must also be tracked. There are measures for the success of students with disabilities, parents and marginalized groups in the organization which are not included in this OIP due to anonymization. The organization needs to see improvement in the success of these groups to consider AAA learning a success. This will keep a focus on humanization metrics so that economic, social and cultural capital are valued in AAA learning implementation.

While quantitative tracking is important to the implementation process, the distribution of power amongst advocacy and inquiry workers is also imperative. Bolman and Deal (2013) suggest utilizing the structural framework of an all-channel network, which resembles adhocracy (Mintzberg, 1980) and the web of inclusion. Sally Helgesen and Daniel Strasser, (2007) describe: "Webs of inclusion are not hierarchical; they use open communication across levels, redistribute power in the organization to the edge,

embrace the outside world, blur conception and execution, adapt and evolve the organization and empower and motivate average members” (para. 1). Bolman and Deal (2013) consider all-channel networks efficient for long-term implementations that are amorphous in nature. The sharing of power and leadership in an all-channel network allows for everyone’s values to be considered and employed.

**Human Resource.** Innovators will need to form a committee to implement AAA learning. This AAA Learning Stakeholder Group will need to be a varied community of practice with members from the student association, faculty, support staff, and administrators. This group will share best practices, track AAA learning and offer support to whomever needs it. This committee will need to be proactive to see where AAA learning is thriving, and where it encounters challenges.

The use of web-conferencing software is easily tracked through information technology. Reaching out to different departments trying to start AAA learning will be a very important measure. The AAA Learning Stakeholder Group will be able to offer its experience to departments, but will also share departments’ experiences so that best practices as well as challenges can be observed.

PD is key to implementing AAA learning, but motivation is also essential. Bolman and Deal (2013) argue that a skilled and motivated workplace is a powerful source of strategic advantage. Several scholars argue a gradual process of PD is the key ingredient for organization change in educational technology (Christie & Jurado, 2009; Poon, 2013; Eastman, 2007; Driscoll, 2002; Snart, 2010). However, there must be an individual sense of ownership to AAA learning to spark motivation. This is how an all-

channel network, which distributes power, can promote self-motivation. Currently, there are PD seminars but they lack faculty participants. Therefore, more P2P PD is needed.

It is important that all stakeholders and their concerns are represented in the mandate of the AAA Learning Stakeholder Group. The mandate of the group must include implementing AAA learning to increase economic, social and cultural capital for the organizational community so no stakeholder group is left behind. Humanization will be part of the implementation of AAA learning. Freire (1968) argues that humanization is not the responsibility of a revolutionary leader but of all those involved. The leadership of humanization will take on a natural movement amongst all members of the committee. The implementation of AAA learning will be connected to stakeholders' values, which Heifetz et al. (2009) argue is necessary for any adaptive challenge.

**Political.** As discussed in Chapter 1, the sharing of power is central for success in the political frame (Bolman & Deal, 2013). Foucault (1977) argues power, while ubiquitous, can be used for any purpose, but that people tend to be suspicious of power and its potential for coercion. To Foucault, power is not an evil commodity, yet the central question remains: what does one do with one's power? A central theme of this OIP is that everyone needs to benefit; therefore, power must be shared. Economic, social and cultural capital must all be valued in the implementation of AAA so that all stakeholders will value it.

Forms of capital are political. Empowering people to express their competing values is political. Giving students a choice in AAA learning is political. This OIP is inherently political. Choosing to take on this adaptive challenge is political. If power is hoarded, there will be winners and losers. However, if power is shared, and all values are

considered, there will only be benefactors. The question of how all of the competing stakeholder groups within the organization can avail together is crucial.

Financially, there must be a return on investment for AAA learning so departments who have implemented the format need to show greater financial contribution to the institution. Programs that have embraced AAA need to confirm greater student enrollment and expanded reach. If those who value economic capital are to win, they must witness a financial influx in order to value AAA learning.

Cultural capital must also be valued in the implementation of AAA learning. Student satisfaction rates must be compared between AAA and traditional programs to measure this increase. These rates can also show where AAA is succeeding, and where it can be ameliorated in a culture of continuous improvement. If students are not satisfied in their academic achievement, but are satisfied with the flexibility of AAA learning, academic achievement will need to be addressed. Through tracking, the aspects which require the most improvement will be revealed. Additionally, graduation rates need to be benchmarked between AAA and traditional programs for enhancement to be seen.

The institution under discussion needs increased social capital. Tracking how well students on the margins perform is essential. Graduation rates are a fair indicator of how these students are doing because they often experience difficulty graduating. Testimonials are another source of how students on the margins are performing better. Stories of success in AAA learning reveal improvements in education as a whole. Whether anecdotal or statistical, evidence needs to be presented about how AAA learning improves social capital.



**Symbolic.** Evidence must be qualitative as well as quantitative, and symbolic achievement needs to be communicated. The AAA Learning Stakeholder Group will share stories of success and challenges in both F2F meetings and online in a discussion forum on the institution's social networking site. The group will also consider which community of practice measures of the Change Process Communication Plan are being used. The AAA Learning Stakeholder Group will discuss what the success and failure narratives are being explained in the institution, what these narratives are, how they are being explained within the institution, and how they affect economic, social and cultural success. From this, conversations will be brought into departments and minds will change one at a time. Stories of how marginalized students are now able to succeed will bring humanization to those who tell the stories as leader-investigators. These stories will also humanize those who hear them in an experience of conscientization.

**Action Items.** To implement the prescribed interventions it will be necessary to have a checklist of action items that can function as a "to-do" list. The following are key actions items for evaluation:

1. To create a committee known as the Anywhere, Anytime, Anyway Learning Stakeholder Group.
2. To track the number of programs that offer anywhere, anytime, anyway learning.
3. To track how many students have been recruited and retained due to AAA learning.
4. To track graduation rates of AAA programs versus traditional programs.
5. To track the financial contribution and student satisfaction rates of departments and programs that are AAA versus traditional programs.

6. To report how the community of practice measures in the Change Process Communication Plan are being implemented.
7. To practice the Giving Voice to Values curriculum within the Anywhere, Anytime, Anyway Learning Stakeholder Group.

## **Leadership Ethics and Organizational Change**

Within a competing values model, every stakeholder and stakeholder group has a different ethical approach in the organization depending on the composition of individual and group values. Therefore, it is important that there be a framework in which all of these approaches can be considered in the implementation of AAA learning. The GVV curriculum offers a practical implementation of ethics in the organization (Gentile, 2014).

This OIP does not seek to state what the ethical concerns should be, and argue how the organization needs to follow them. Rather, within a competing values framework, each individual and group needs to be able to voice their values according to what they believe. As discussed in Chapter 1, various approaches to ethical leadership have considered the leader as the principle agent of change. These methods have not been relational in nature (Kirschenbaum, Harmin, Howe & Simon, 1977; Liu, 2015; Winter & Bolden, 2016).

In contrast, the basis of humanization and conscientization has long been based in relational values not in individualism (Freire, 1968). Liu (2015) has called into question the binary dominance of leaders ‘doing things’ to followers to enact leadership. Rather, Liu argues that “...relational leadership suggests that individual leader action must be fundamentally concerned with its effect on others” (p. 5). This OIP has a relational focus in ethical leadership to build a community of practice. This OIP philosophically rejects

the idea of building a document of leader behaviours to enact upon organizational followers. To the contrary, this OIP embraces a relational, social constructivist, communitarian view of ethics based in a community of practice sharing and developing its own ethical leadership through GVV (Gentile, 2014).

It is important to note that ethical considerations are not always practical or efficient. This is not necessarily because agents want to ignore them, but being ethical is a learned skill. Gentile (2014) argues that learning ethics through philosophy requires not only an individual to comprehend complex philosophical ideas, but also a teacher to explain them. GVV asks participants to respond to ethical questions, and then script what they will say in an ethically problematic situation. Thus, individuals become better equipped to act ethically. Agents not only know the right course of action based on their own self-exploration, but they have also practiced doing what they believe is right on a personal basis. Knowing ethics and exercising ethical behaviour are not the same.

The GVV does not explicitly state what is right, but instead emphasizes dialogue, which is followed by ethical action (Gentile, 2014). This gives it compatibility with the competing values framework in which all stakeholder groups approach ethical positions differently. What is important is that individuals and groups know how to implement AAA learning ethically.

The GVV is also incredibly versatile and has been used in classrooms and workplaces from East Asia to the Indian subcontinent to West Africa (Gentile, 2015). It has been used: "...in legal, engineering and medical education; in executive coaching; in sports leadership development; and in companies across a wide variety of industries and geographies" (Gentile, 2014). Since it does not require deep philosophical pre-knowledge

on the part of instructors and students, it is a practical framework to address the skill of being ethical. Its vast scope has proven this to be true.

Gentile (2015) offers the following questions for groups to work through to prepare to enact ethics (p. 38):

What is the values-based position that the protagonist wants to promote/achieve?

What is at stake or at risk for all affected parties? (This question is intended not as a prelude to a traditional stakeholder analysis but rather as a way to identify potential influence strategies. That is, if I am worried about the cost of refusing to help my roommate to cheat, perhaps you could help me see ways to say “no” to him or her diplomatically.)

What are the “reasons and rationalizations” (the pushback or objections) the protagonist is most likely to hear when they do try to voice and enact their values? These arguments are often predictable and vulnerable to response if we anticipate them and practice.

What is the best script and action plan for the protagonist? How can we respond to the objections identified here and/or reframe the challenge in a way that is most effective?

**Administrators.** As administrators are evaluated by economic capital in a neoliberal framework, they need to be able to espouse these values and know they are heard. Neoliberals believe in emancipatory capitalism, and that entrepreneurship will lead to better lives (Fraser, 2011). They also believe that by focusing on employability in education, it will offer practical solutions to students’ lives and increase their material

success (Hicks, 2013). Their view is that economic capital is the door to greater social and cultural capital.

However, Arce and Gentile (2015) offer a warning when economic capital is at the fore. In their discussion of teaching ethics to economics students, they explain the risk that “the positivist economic approach leads to amorality in defining the parameters of managerial decisions outside the classroom or laboratory” (p. 536). Critical authors like Giroux (2013; 2014) and Ryan (2012) have observed the connection between positivism and neoliberalism, and the dehumanizing effect it can have. These values will run into conflict with the humanization that democratic educators try to institute. Through the GVV curriculum, there will be an opportunity for neoliberals and democratic educators to discuss humanization, self-actualization and praxis. This conversation is conscientization.

**Faculty members.** Faculty members are deeply concerned about obsolescence (Eastman, 2007). People’s livelihood is an ethical issue, and all stakeholders need to take this seriously. The GVV curriculum provides a space in which this fear can be addressed explicitly. Once faculty members on the committee are able to safely express their anxiety and know it is being considered, they can become proponents for AAA learning to other faculty members.

Faculty members are also concerned with the quality of education students receive. The GVV curriculum gives faculty members the opportunity to role play the conversations they will inevitably have about how giving students choice gives them the personal freedom to succeed academically.

**Students.** Students want to be able to access their education on an AAA basis, reflecting their lifestyles (Simsek, 2015). The conversations in the GVV curriculum will

allow them to better discuss the liberation AAA learning offers. Castro (2010) has observed that millennials are especially aware of the complexity of issues facing marginalized groups. From the GVV curriculum, students will have an opportunity to express these values to other stakeholders, thus expanding ethical awareness not only in the group, but throughout the institution.

**Innovators.** Those most passionate about AAA learning and educational technology need to be in the milieu of values that other stakeholder groups possess. Early adopters of technology often want others to follow their lead rapidly, but this implementation process is a gradual change, not a revolution. Patience is important to avoid coercion (Kotter and Schlesinger, 2008). The GVV curriculum will give the opportunity for innovators to see the competing values expressed and adjust accordingly to other groups' timelines. Innovators will need to facilitate positive adaptation, but also act as brokers, leveraging political and network capital (Tong & Avery, 2015).

## **Change Process Communications Plan**

The dissemination of this OIP will occur through a community of practice known as the AAA Learning Stakeholder Group. Hoadley (2012) contextualizes access to experts, common identity and peripheral participation as key components of a community of practice. The communication plan synthesizes Driscoll's (2002) 10 techniques to implementation within the context of Hoadley's content, process, context model as well as Hoadley and Kilner's (2005) C4P framework for communities of practice.

Faculty members need to be the main target to see the potential of humanistic online education. Although administrators, students and innovators also need to understand AAA learning, faculty members are the group outside of the organizational

consensus. The AAA Learning Stakeholder Group will focus on developing surrogacy from a grassroots level for all stakeholders and practice conversations through the GVV curriculum, then communicate directly with others throughout the institution in a self-determined process. As faculty members are skeptical of administration initiatives and slogans, implementation needs to be a slow P2P process of one faculty member helping another. Once a critical mass of departments using AAA learning has formed, a linear stage plan of implementation can take place, but not before there is a competing narrative to the status quo.

Through a community of practice, institutional capacity can grow and challenges to communication can be addressed (Stoll et al., 2006). First, key constructs like organizational trust, resistance to change, and organizational cynicism are more effectively addressed through a P2P program (Thundiyil et al., 2015), such as a community of practice. This is opposed to the more traditional method of administrative advocacy, which has resulted in stalled implementation. An algorithmic plan cannot overcome issues in organizational trust, resistance to change, and organizational cynicism (Katz et al., 2013). A heuristic plan, based in a community of practice, allows all kinds of dialogical solutions to come to the fore. Once a competing status quo emerges, that juxtaposes AAA learning with the traditional classroom within the organizational culture, an algorithmic plan is possible. That, however, that is outside the scope of this OIP.

**10 Techniques to Implementation.** Driscoll (2002) provides 10 techniques, current in teacher development research for blended learning (Hui, 2016; Tseng & Walsh, 2016; Yildiz, 2016), to assist with implementation: (1) put the assessment online, (2) follow up with a community of practice, (3) make reference materials available, (4)

deliver pre-work online, (5) provide online office hours, (6) use mentoring/coaching as a tool, (7) provide job-aids, (8) access experts, (9) create a “lifeline,” and (10) maximize messaging.

These techniques work as pedagogical strategies for instructors but Driscoll (2002) also discusses them in the context of the workplace. First, building faculty member self-assessments for AAA learning and then putting them online can give faculty members the knowledge that they have fulfilled their preparatory obligations satisfactorily. This can also allow professional development support staff and administrators the ability, electronically, to track issues faculty members may be experiencing. Second, creating an online community of practice like a discussion board or social network can allow faculty members to exchange ideas of best practices and provide a safety net for instructors and staff who feel less confident with blended learning or need greater access to experts. Third, ensuring faculty members and students can access reference materials for all AAA tools, especially web-conferencing, allows a greater depth of exploration and referencing of course and program materials. Fourth, delivering pre-work online is relevant to both F2F and web-conferencing students and can also provide practical exploration prior to professional development. Fifth, providing online office hours from technical experts provides the workplace safety net for faculty members and students using web-conferencing. Sixth, having a mentor, for both faculty members and students, allows the user of web-conferencing the personal experience to explore and question the blended learning process. Seventh, providing job-aids means ensuring faculty members and students have the technology they require, with quick reference guides to using the technology in their class experience. Eighth, access to



experts outside the institution allows faculty members to grow in their capacities using web-conferencing. Ninth, creating a ‘lifeline’ – a list of internal experts using web-conferencing – allows faculty members and students to learn from their peers and helps to organize advocacy and inquiry workers. Tenth, maximizing messaging allows conversations to continue outside of formal PD sessions and informal meetings with advocacy and inquiry workers. It also attracts more introverts who are often concerned about taking other people’s time.

Driscoll’s (2002) techniques can be considered as building a community of knowledge within the CPC model (Hoadley, 2012). First, content affordance refers to storing and transmitting data for synchronous and asynchronous needs like (1) online assessment, (3) available reference material, (7) job aids and (10) messaging. Second, process affordance allows the scaffolding of tasks into sequences of action such as (2) following up with a community of practice, (4) delivering pre-work online, (8) accessing an expert and (9) creating a lifeline. Third, context affordance allows the user to shift social context like (5) maximizing messaging, (6) mentorship as a tool and (10) providing online office hours. Hoadley argues these tools “...improve learning generally, and a community of practice specifically” (p. 296).

The C4P framework (Figure 8) outlines AAA implementation through interventions. Through content, conversations, connections and context, purpose is established within the community of practice (Hoadley & Kilner, 2005). This model provides the necessary flexibility that a diverse community requires as it facilitates peripheral membership and allows new members to evolve into the community (Hoadley, 2012). Additionally, amongst diverse educators, Hoadley and Kilner explain the C4P

framework conforms to various relational philosophies of education such as behaviorist, developmental, cognitive, and sociocultural learning, while rejecting neoliberal models of knowledge transmission.

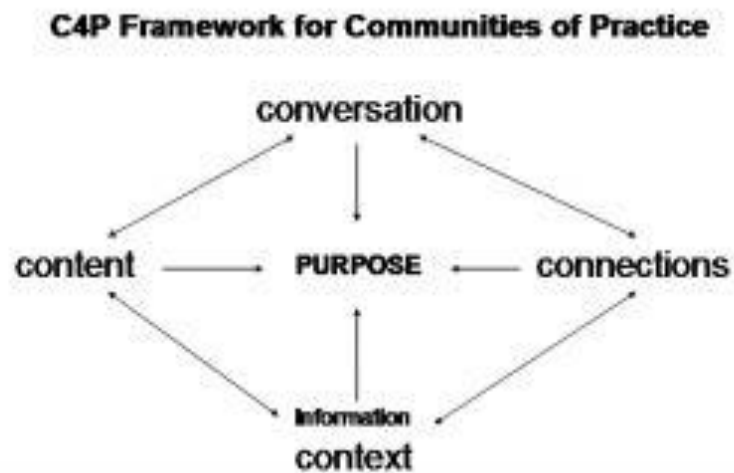


Figure 8. C4P Framework (Hoadley & Kilner, 2005, p. 34)

Hoadley and Kilner (2005) contend that content is attractive to new members of a community of practice because it provides immediate value and implicit socialization. Hoadley (2012) adds that content provides immediate periphery membership through non-committal action, such as articles and guides easily accessible to members on the periphery through the social networking system. However, the greatest challenge in the content area is creating quality materials which are also relevant, and then making them easily available. This will make the group attractive, making paramount the need to know (Intervention #3) what challenges are technical and adaptive and (Intervention #4) gaps between espoused values and behaviours.

Hoadley and Kilner (2005) argue that conversation focusing on content builds knowledge, especially in the context of a shared purpose and objective. These

conversations establish a culture of safety within the community of practice and allow members to talk through ideas they might not otherwise present. Quality content and conversations build connections which Hoadley and Kilner call "...the lifeblood of a knowledge community" (p. 34). This highlights (Intervention #5) identifying commonly held beliefs, (Interventions #6, 9, 10) the use of the GVV curriculum, (Intervention #8) sharing success and resistance and (Interventions #11, 12) sharing needs for support.

Information context reveals the source of information and its usefulness to the community of practice, which enhances the quality of content (Hoadley & Kilner, 2005). This allows the group to ask why-questions through relational means of knowledge construction. Information context becomes pertinent for (Intervention #7) the direction taken in professional development and (Intervention #9) the use of best practices (Driscoll, 2002).

There is a general principle in these techniques that teaching on an AAA basis requires support on an AAA basis. Even if it is not used, knowing the support is there deregulates stress, removing pressure from students and faculty members. These tools set the environment for a well-supported AAA working and learning environment which demonstrates, reinforces and communicates best practices. This is meant to create a holistic environment, which has a holding pattern of support, in which AAA learning is celebrated in the institutional culture.

## **Next Steps and Future Considerations**

The first step is to create the AAA Learning Stakeholder Group, from which the other deliverables listed in this chapter can be pursued. The group is then able to expand and choose its priorities. AAA implementation will then be able to take root organically,

as an adaptive change (Heifetz, 2009), through the enactment of the twelve interventions outlined in this chapter (Table 2). It will be monitored through structural, political, symbolic, and human resource considerations.

## **Conclusion**

AAA learning has the capacity to bring the institution under discussion into the 21<sup>st</sup> century while simultaneously increasing democracy. People in this era enjoy AAA lifestyles, and their education needs to reflect their society. Through the twelve interventions based in Adaptive Leadership, a community of practice known as the AAA Stakeholder Group will be able to build the values most important to them, thus expanding cultural, social and economic capital for the institution. Rather than winners and losers, there will be benefactors. The implementation process will be monitored through structural, political, symbolic, and human resource considerations. The process of AAA learning implementation can provide the location for competing values to come together and enter into a discussion of democratic values and conscientization.

## Summary and Conclusions

In conclusion, the first two decades of the 21<sup>st</sup> century have given people choices in where, when and how they live their lives through massive social and technological advancement. During this time, online learning has greatly increased, but in postsecondary education it has all too often been designed to serve market forces. As technology becomes ever more pervasive in society, online learning will only increase. It is the decision of democratic educators as to whether this increase will continue to serve market forces, or will expand the humanization of society.

While there is a robust body of academic literature about blended learning in the context of pedagogy, this OIP expands the focus of literature to educational leadership and implementation. Within not only the institution under discussion, but also society as a whole, if online educational leadership is not championed by democratic educators, then neoliberal asynchronous transactional online education will come to dominate the following decades. The gains the predecessors of the 1970s and 1980s made in arguing education is fundamentally relational, will be lost to the dustbin of history. At the risk of histrionics, education as a field is at stake. F2F education as it was in the 1980s and 1990s will not return. Whether online democratic educators pursue AAA learning, or devise other methods, democratic educators must take responsibility for online education because neoliberals will be happy to let the market dictate what is democratic.

When individuals come together and express their values and fears, it is possible to increase democracy. Educational technology in general, AAA learning specifically, can be harnessed to produce greater IT business capacity and/or humanization. As Freire (1968) warns us, there is no sitting on the proverbial fence. If one does not act, one endorses the status quo. That means educational spaces, with their adjacent technology, used in the service of the market. On the contrary, educational technology can be used to expand democratic, social and/or economic capital. You must now decide what side you are on, because there is no neutral. As Geddy Lee of Rush once told us, “If you choose not to decide you still have made a choice” (Lee & Lifeson, 1980).

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