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DEVELOPMENT ARTICLE

# The critical, relational practice of instructional design in higher education: an emerging model of change agency

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**Abstract** This paper offers an emerging interpretive framework for understanding the active role instructional designers play in the transformation of learning systems in higher education. A 3-year study of instructional designers in Canadian universities revealed how, through reflexive critical practice, designers are active, moral, political, and influential in activating change at interpersonal, professional, institutional and societal levels. Through narrative inquiry the voices of designers reflect the scope of agency, community and relational practice in which they regularly engage with faculty in institutions of higher learning.

**Keywords** Instructional designers · Instructional design practice · Narrative inquiry · Moral agency · Instructional design theory

## Introduction

Research examining the actual practice of instructional designers suggests that designers do draw on conventional techniques in instructional design, but their practice varies widely according to context (Cox 2003; Cox and Osguthorpe 2003; Kenny et al. 2005; Visscher-Voerman and Gustafson 2004). The literature of instructional design often focuses on discrete skills and activities, even where it identifies non-traditional elements.

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By concentrating on functional elements, we risk overlooking important and emerging questions about what it *means* to be an instructional designer. How do instructional designers extract meaning from their daily practice? How do they construct and enact their professional identities? What do instructional designers perceive as their role and how do they describe the importance of what they do?

### Instructional design and change agency

In this paper, we focus on a different facet of the instructional design process, that of the role instructional designers play as change agents. What do we mean by change agency in instructional design contexts and how does it influence the practice of instructional design? We describe change agency as a process in which “we play a dynamic and crucial role in shaping our own structures and processes whether we are aware of doing this or not” (Herda 1999, p. 25). Although Herda refers to the actions of researchers, we believe that the question and responses Herda offers have particular relevance to instructional design. “How do we change our actions ... within the broader professional community so that our (work) may take on a significance in our own lives and in the lives of our participants?... The first (response) is to change our notion of action from one grounded in behaviorism (i.e. stimulus/response)... to one grounded in moral decisions, and the second is to change our idea of professional identity” (p. 91).

This study, then, is fundamentally about how designers shape their practice, and their professional identities, in particular socio-cultural contexts, through language and relationships with their clients, learners, colleagues and administrators, and how their actions may contribute strongly to changing the way colleges and universities realize their instructional missions. As a complex, socio-cultural process the moral dimension of instructional design refers not to “right” and “wrong” decisions or actions, but instead to this fundamental importance of relationships in which mutual commitments are made, with integrity, to enhance success—success in teaching, success in learning, success in service—success for positive social change.

Instructional designers work directly with faculty and other clients to help them think more critically about the needs of all learners, about issues of access, about the social and cultural implications of the use of information technologies, about alternative learning environments, and about related policy development. As such, through reflexive and critical practice, and interpersonal agency, they are important participants in shaping interpersonal, institutional and societal agendas for change. Therefore, we view instructional design not simply as a technical methodology to be applied to design situations, but also as a socially constructed practice.

We suggest that clients working with instructional designers in instructional development projects are actually engaging, as learners, in a process of professional and personal transformation that has the potential to transform the participants and the institution. Rogoff (1990) argues that participation in learning hinges on communication between people in a group, in terms of shared understanding or shared thinking. Glaser (1991), Tergan (1997), and others believe that learning is most effective if it is embedded in social experience, is situated in authentic problem-solving contexts entailing cognitive demands relevant for coping with real life situations, and occurs through social intercourse. The instructional design process, in which faculty, designers, and others develop new ideas and understandings through conversation, may be a form of cultural learning or collaborative learning.

## Methodology

### The research design

The findings reported in this paper were drawn from a 4-year (2002–2006) study of 20 instructional designers at six Canadian tertiary educational institutions with an administrative or academic unit mandated to support, faculty-initiated course development. Participation was elicited through a range of strategies, including the snowball technique, based on personal email invitations, advertisements on listservs and in institutional communications platforms (e.g., faculty newsletters), personal contacts at professional meetings and through collaborative projects, membership lists from professional associations and delegate lists from conferences, references from other participants, and visits to graduate classes. Sources of data include research conversations with instructional designers, email, focus group transcripts, group meetings, and “story circles” in which designers shared stories of practice dilemmas with each other.

### *Data collection*

Two different approaches were used for gathering data. Initially, six instructional designers in higher education institutions were interviewed using a semi-structured interview protocol and participants were asked to discuss their backgrounds, identities, practices, communities and concerns.

For the remaining 14 interviews, we used a narrative inquiry approach. We felt the shift in methodology was important because narrative inquiry focuses more strongly on the storying of experience. It had become clear to us from our initial interviews that the instructional design practices we were examining were socially and contextually situated interpretive practices and that this approach would help us to see them as such. In essence, we needed to start with an exploration of the personal, that is, to look at “personal knowledge ... as a source for deliberation, intuitive decisions, daily action and moral wisdom” (Conle 2000, p. 51). Stories, then, consist of a set of narratives woven together to work towards change. Thus the methodological approach for the study mirrors a social constructivist framework for instructional design practice, which is one of social interaction and construction of meaning through conversation and within a community of practice. In the first meeting with each instructional designer we used a semi-structured interview protocol that served as an introduction to the study, but on subsequent occasions participants were asked to discuss their backgrounds, identities, practices, communities and concerns, and encouraged to tell stories of their design practice.

In all cases, except for focus group participants, whose attendance was not recorded, transcripts were sent to participants for correction, clarification, elaboration, and approval. As we elaborate the components of this model, and their basis in moral action, we provide a context for designers’ voices. Table 1 relates the participants’ educational backgrounds to the institutional contexts in which they practiced at the time of the interview.

### *Data analysis*

Post hoc analysis of transcripts was done using Atlas Ti software, and data were analyzed to identify shared themes and understandings. Two researchers reviewed each transcript and negotiated the units of meaning that were extracted from the data. We then met as a

**Table 1** Designers' HE contexts

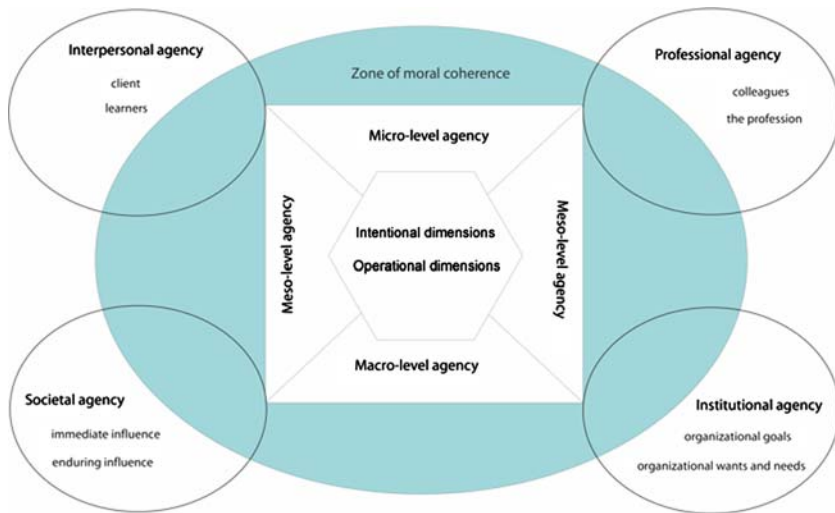
Institutional context	Pseudonym	Gender	Highest degree attained
Technical college w/baccalaureates	Skye	F	MEd
Research-intensive University—large	Penelope	F	PhD
	Nat	M	MEd/MBA
	David	M	M.A. (partial Ph.D.)
	Dennis	M	MA
	George	M	PhD
	Anna	F	ABD*
	Steve	M	MA
	Laura	F	MEd
	Denise	F	MEd
	Yan	M	MEd
	Maria	F	MEd
Research-intensive University—medium	Lorne	M	EdD
	Sandra	F	PhD
	Barbara	F	MEd
	Halle	F	MEd
	Darlene	F	PhD
Research-intensive University—small	Jeanne	F	MEd
Open learning/DE	Mehta	F	MEd
	Heidi	F	PhD
	Li	F	MA
Consultant	Terry	M	Med

\* All but dissertation

full research team for two days and negotiated a set of major themes that emerged from our preliminary data analysis. Themes included entry routes into ID, preparing for practice (learning theory) and actual practice, roles, the purposes for instructional design, relationships and communities, power, values, identity, the public vs. private persona, and metaphors of design. The change agency model presented below was developed from a further explication of those themes.

### A proposed multivariate agentic model

As analysis of the main themes progressed, it has become clear to us that what we initially thought of as change agency—instructional designers working directly with faculty to think more critically about the needs of all learners, about issues of access, about the social and cultural implications of the use of information technologies, and so on—at the beginning of the study is actually multivariate in nature. The narratives revealed several different types of agency in play, intersecting at different points in practice and context and expressed in quite different and individual ways. These types of agency appeared to fit into four categories: interpersonal, professional, institutional and societal. We now propose that these form a complex and reflexive “agentic model of instructional design” with both intentional and operational dimensions (Schwier et al. 2007). A tentative picture of what



**Fig. 1** An emerging model of change agency in instructional design

this emerging model is beginning to look like is provided in Fig. 1, and the remainder of this paper will elaborate the model.

As we elaborate the components of this model, and their basis in moral action, we attend to the voices of instructional designers.

#### Four types of agency

Interpersonal, professional, institutional and societal types of ID agency regularly surfaced in the stories we heard, so they formed the key touchstones of the model. These were not selected as the key features of the model because of their frequency or their categorical precision. Instead, we identified these types of agency to attempt to categorize stories that percolated in the narrative data; the categories were not mutually exclusive, nor were they equally represented in the data. Rather, these were categories that were resonant with the data and that illustrated the powerful and personal perspectives of designers when they considered their roles as agents of change. In the stories we heard, these four dimensions of change agency undulated and interacted in ways that suggested that when combined, they expressed agency in small (micro), intermediate (meso), and large (macro) ways. In addition, we learned from our participants that they were acutely aware of when their values and the values of clients, the profession, and institutions were aligned or in conflict, and this awareness had a strong influence on their practice and attitudes. In the model, we represented this as a zone of moral coherence, recognizing that instructional designers operate in and out of that zone on projects they undertake in the intentional and operational dimensions of their work.

#### Interpersonal agency

Interpersonal agency is characterized by the commitment made by instructional designers to others involved in the project, and emphasizes collegial engagement and advocacy,

suggesting that instructional designers have a strong sense of moral responsibility to their clients and team members. Instructional design is a social, relational process created and shared through language, which is a form of action (Herda 1999). For example, when we engage faculty in a conversation about the consequences of designing for active learning, including the development of critical thinking skills, we are “altering and changing (a) social context (and), those statements, themselves, contribute significantly to a basis for personal and social change” (p. 26).

### *Learner advocacy*

While collegial, interpersonal advocacy is also expressed as a personal obligation to learners—those whose learning will be influenced by the success of the instructional design project—this level of advocacy is deeply held and profoundly reflects the personal values and philosophy of the designer. Lorne described his role this way, “I need to...design for people who don’t usually have a voice in what happens to them in their educational lives...I have to be their voice until they can speak for themselves.”

### *Building trust and faculty self-efficacy*

Designers exemplifying interpersonal agency discussed the importance of deliberately building relationships with faculty clients as requisite and ongoing rather than what happens just before the design process begins. How that is done varies from designer to designer, but the end-goal is similar: to build an atmosphere of trust that relates to the client’s professional identity, and that can be nurtured throughout the design process, and sometimes long after. Sandra acknowledges the client’s personal conflict before the design conversation begins.

It’s really easy to say... that there’s no emotion here. We’re just going to take this pure physics content and we’re going to turn it into a lovely physics course. But... (someone’s) been passionate about this content for God knows how long, and they’ve been asked to do something they’re fundamentally afraid... So it really is a trust issue as well as a physical process and making sure that we have the same language.

In many cases, instructional designers find themselves working with novice instructors who may enter projects with reasonable levels of confidence about their content, but who are much less confident about their teaching skills. A designer realizes that the client is vulnerable. Darlene pointed out:

They’ve been told to come to this process... Because they have the content knowledge... but this whole thing about technology, the relationship with students... being on television, using a blended model, is really setting them back, because they don’t feel they walk into it with confidence.

### *The politics of interpersonal agency*

Interpersonal agency may also have a political dimension. For example, if a client is in a departmental culture that is characterized by suspicion and competition, he/she may want to treat any product as private and proprietary. Instructional designers know that part of

their interpersonal agency is related to advocating for the client's position within the political culture of the institution, although, as Heather comments, they may consider this type of agency unproductive: "I seem to be spending time on putting out fires around issues of professionalism and old wounds."

### *Faculty development*

Helping instructors learn how to perform in new learning environments was an important part of instructional designers' interpersonal agency. Many instructional designers were teachers; drawing on a positive and coherent identity they see faculty development activities as opportunities for reciprocal learning. Lorne points out the potential for transformed practice, believing "faculty then begin ... this cross-fertilization, if you will, and a deeper understanding of what the issues are in teaching and learning within a multitude of disciplines."

### *Community-building*

The instructional designers we talked to frequently mentioned the importance of working in teams. Often viewed in terms of project leadership and oversight, teams encouraged relationship-building and explicit conflict resolution. Like Skye, they viewed project management in terms of service to their clients.

Having respect for other people's points of view and trying to develop curriculum (to) ... a mutually agreed upon goal ()... is more of a servant leadership goal where you actually serve the people that you work for and serve the people that are developing for you... It is not as if you are an authority-figure telling people what to do.

### *Professional agency*

Professional agency is characterized by a feeling of responsibility to the profession—to do instructional design well and to act in a professionally competent and ethical manner. Given the extensive literature on instructional design models and the widespread teaching of these models in graduate programs, many instructional designers worry that they aren't performing their roles as designers well if they augment or ignore particular parts of the conventional ID process (Hill et al. 2004). The fact that instructional design practice is such an ill-structured problem domain (Jonassen 2004) filled with conceptual and practical ambiguity, is a source of stress and doubt for designers.

### *Providing instructional advice*

Many designers described their role as instructional advisor. The forms of instructional advice they provided varied, but they frequently did so in a tacit or surreptitious manner by modifying materials presented to them by faculty. However, these designers also indicated that they were able to engage in an active discussion of instructional strategies with faculty members:

Ok, how can we best get across this content that... encourages, critical thinking, encourages people... helps them in the process of assimilating into their already existing knowledge and respect them as people?' And, how can we just avoid that, 'I am the expert and you are the learner and memorize this' kind of approach? ... it is a learning process (George).

### Professional agency and identity

Like any other professional activity, instructional design cannot help but be influenced by the embedded values and identity of the institution in which it operates. Universities are organized in faculties as independent units and, while universities are ostensibly egalitarian organizations, faculty members are seen as the central players with the highest status. Instructional designers, typically employed by service departments, are generally seen as support staff whether or not they have official faculty status.<sup>1</sup>

Professional agency, then, also encompasses professional education and the question of academic credentials. Most often, designers indicated that they had graduate training, usually a Masters degree in Education, with a focus on media, educational technology, or instructional design theory. In this regard, our participants frequently raised issues around their perceived status and how that influences, positively or negatively, their effectiveness as designers and their professional agency. The implication of instructional designers holding a PhD or EdD in higher education was frequently raised in terms of credibility within the academic culture. George acknowledged this stating that, "I have...the 'ticket', the PhD...so if I interact as a faculty member that kind of gets me in...If I go out as an Instructional Designer I certainly don't feel that same level of respect."

However, instructional designers working in higher education do not always enter practice with credentials in instructional design or teaching. They frequently take alternate career paths and their career choices can be pragmatic, even opportunistic. It is not unusual for individuals holding instructional design positions to first gain graduate credentials in an academic area and start out teaching at some level in higher education. They then become interested in and involved with distance education or teaching with technology and learn about instructional design formally or informally on the job. However, despite issues of identity and the negotiation of status (see below), many of our respondents believed that they have a real expertise to be shared. David characterizes this reciprocity as a persuasive conversation.

(It)... has to do with the quality of... the entire learning experience that the...student can have... that's a major conversation with course authors or content experts or subject matter experts... that conversation for me has always been persuasion. I... see the instructional design possibilities as a kind of a long spectrum, and it's just how far can you get to the people down the line?

<sup>1</sup> A recent discussion of on ITForum centered on the perception of instructional designer credentials reflected in job advertisements, which ranged from low-level technical positions to managerial/professional designations, but in very few cases tenure-stream academic positions.



The expertise that our respondents felt they had to share frequently focused on how learning occurred in technology-based learning situations. George brought his pedagogical expertise to the table in the form of reusable learning designs, a kind of training wheels, hoping that his faculty client would then be able to proceed on his own. Ultimately, this approach provides a learning scaffold for the client.

I don't think (he) had the experience to develop PBL on-line... so I couldn't expect him... (to work) with templates that he could copy and paste... You have to reorganize the whole course, how you would see it work as PBL and then show it to him... that can serve as the template because the context is there plus the content is there. So... for the next module (he can) just copy the content and change a few things but the structure is there...

### Institutional agency

This agency includes a felt responsibility to advance the interests, and perhaps align oneself with the tacit and explicit values of host institutions. For example, if universities are promoting a teacher-scholar model, then instructional designers may emphasize activities that tie the research programs of faculty to their teaching, or help them see ways to include the scholarship of teaching (Boyer 1990) as part of their research programs. If the institution emphasizes a cost-recovery model, instructional designers may see themselves as leaders in developing learning environments that the organization can market to a wide audience. Institutional agency may be expressed in tension they feel between organizational needs and personal values. For example, an instructional designer who feels a moral/ethical responsibility to provide the best possible learning experiences for students, may feel in conflict with an institutional emphasis on cost recovery (Campbell et al. 2005). Several, like David, felt agentic responsibility to move the institution's priorities, in this case believing that if HE institutions didn't seriously consider the issues of "moving forward in distance education, especially technology-enhanced learning issues...very soon, they're going to find themselves in policy nether land, where nothing works."

### *Cultural considerations of agency*

Our analysis found evidence that instructional designers had an appreciation for the culture of the university. In higher education, the cultural considerations of agency include several dimensions. In the political dimension designers were acutely aware of the importance of political knowledge, experience, process and actions involved in their work. Sandra has worked as a designer in the public schools, a governmental agency and both open and traditional universities, and understands that "every institution has an embedded culture. That culture thrives on shared values and shared perspectives of the world. An open learning perspective of the world carries with it a different set of assumptions than a traditional university carries." Lorne described the designer's political role as a critical enabler, "There is a whole range of political knowledge, political processes that you need to have, and political action you have to take to exercise your instructional design role."

One challenge is that there are many cultures at work in HE, even within Faculties, and a designer would "go from Engineering to Dentistry to Education to Vet Med and I was just shaking my head. What I had to learn, over time, was... there's a poly-culture here of

pedagogy. You've got to have your sensors out, so when it's time to rip off the cognitivist hat and...put on the constructivist hat...you don't have any personal conflicts happening" (Sandra).

### *Designer status and ability to effect change*

The designer's effectiveness is also related to the broader university community of practice, and the instructional designer's status in the institution. In our interviews, instructional designers spoke passionately about how they felt powerless to create meaningful change and the resistance of institutions to change. We think this is important because it illustrates how change agency is a posture taken by individuals, and an instructional designer can be a change agent, even if she/he is unsuccessful at provoking change. As Sandra now knows, change agency compels a sense of moral obligation to one's partners; an alertness to the counter-agency of conflicting academic expectations.

My most spectacular failure was because I didn't know (that I was a mediator) and we lost one of the most amazing projects that we've ever funded... because the SME involved was seen as not being devoted enough to research and devoting too much energy into what we were asking of him. Because this person was such a great team player, and didn't want to disappoint anyone, he almost lost his job.

Instructional designers have a strong sense of significant issues that higher education institutions encounter when they adopt technology enhanced learning projects. Institutional priorities and reward systems; the perceived value of teaching as compared to research; ownership of, and authority to alter content are all important challenges that institutions face, and instructional designers are leading discussions that have the potential to change how institutions manage teaching and demonstrate its value.

### *Cultural conflict*

When instructional designers find themselves in conflict with institutional values, and powerless to effect necessary change, they are often left with a decision about whether to continue in the employ of the organization—a decision based on an ethical dilemma. In these cases, frustration emanates from a lack of moral coherence between institutional and personal values. Skye found that “fit” became a matter of personal and professional integrity.

I knew that I had to leave when after the fourth time in one day my supervisor gave me new instructions on the same thing... I was really not able to stay in that kind of an environment because I couldn't adapt the way they needed... they had a very specific structure, it was very much cookie cutter... it was a dead end for me on a number of levels.

These are a few ways that institutional agency plays out in organizations. Other ways include challenges such as professionalism, workload, pedagogical orientation, institutional context, efficiency, creativity, a culture of innovation, and competition. In every case, institutional change agency is a tug-of-war between values and cultures, and in this type of agency—probably more than any other—the interactions are moderated by an overlay of power relationships. Who has authority to make change, and how change is negotiated is at the heart of institutional agency.

## Societal agency

Societal agency is characterized by a need to see beyond the confines of immediate work to know that design is contributing to a larger, more significant societal influence. For many of these designers, societal agency has its roots in interpersonal agency, embodied in relational practice with faculty clients and in learner advocacy; and institutional agency, at which level designers may see their impact on pedagogical transformation. The designers who spoke about a vision for change on a “global” level tended to characterize their work as process-oriented, unfolding in a social context in which they were able to connect with their clients through a discussion of shared values about the purposes of education for a “better world.” However, because instructional designers are often considered “instructional support” there is an important disconnect between their perceived responsibility and their perceived authority to influence change on a meaningful scale.

### *Societal agency and early socialization*

Designers describing societal agency located their core values in early socialization through parents and influential teachers and colleagues; several referred to an experience of dissonance that was instrumental in setting them on the path to societal agency through instructional design. They spoke of early role models, of life-changing international experiences, and early career choices that reflected social activism. Yan worked for approximately two decades with immigrant service organizations, community work programs, and international language programs, including several years at a community college teaching English to political refugees. She described her career trajectory as being based in her “lower middle-class background”.

I worked with people who... were quite active in a number of (educational) political movements... when you talk about teaching in *that* context, you're...talking about... social justice... It's quite interesting for me to... work with professors... who are very knowledgeable in their area but... it's hard for them to convey... the significance of that content... within the wider context of the world... It's more my informal education through working with people who were... very much into... Freire... that has been... a consciousness that has evolved for me in the past 20 years.

Designers with a highly developed sense of societal agency may risk burnout. Teaching English to refugees who “had seen their families killed in front of them” meant that “(instructors) were dealing with...not just content, but how do people learn to live in a new environment...(Through that) an instructor learns how to...teach more effectively.” Yan acknowledged that “working in a high needs area is very, very demanding and I'm not sure I could do that anymore.”

### *Disorienting dilemmas and ethical challenges*

Although few of these designers traced the genesis of societal agency to a particular moment in their personal or professional lives many reflected about the contexts in which they encountered “disorienting dilemmas.” A disorienting dilemma is a trigger point that, through critical reflection, challenges one's existing worldview and may lead to a foundational reframing of core beliefs, assumptions, and values (Mezirow 2000). In our

conversations these designers traced learning design decisions, or even their decision to become an instructional designer, to such experiences. For example, David talked about how his father's radical politics resulted in a family move to a community that included First Nations and a working class, union-based, multi-cultural mix—that was always a big part of his life. In the early 80's, after obtaining a graduate degree in the humanities and teaching at a socially/politically active institution, “the social mission took over from that sort of subject content...interest that I had,” and he joined a public open learning agency to work with aboriginal communities that were “quite forward-looking Nations, and individual bands within that were looking to taking over or getting more control over their own education.” David's background underlies the delight he takes in resisting authoritarian structures that thwart access. He grinned as he talked about a community leader, who:

asked me if we would be interested... the senior administration... declined the project. So I went and did it anyway. It's been sort of a practice that gets me in hot water now and then, but everybody needs hot water now and then... There were about 23 different First Nations groups... We were fortunate also that we had people who also felt that that the social issue was important and that distance education students needed different kinds of support.

Similarly, Steve related his experience in an international development project to his eventual decision to work on international development projects through a youth group, “I (went) to Indonesia... and that was just totally life changing... We helped the women's organization in the little village we lived in... no electricity, no running water... we helped them apply for a grant... to fund an income generating duck farm.”

In some cases, if the institution permitted a choice of projects, these designers gravitated towards Faculties and projects that reflected their own values about the social purposes of design. For example, immigrating from an Asian culture and trying to adapt to post-secondary education in Canada in a foreign language gave Li insight into designing for cultural inclusion, and led to her recent participation in an institutional task force “to educate our learners to be global citizens and...to bring our program out to other countries and to add value to those learners...I was picked out of the over 30 people who were very interested...everyone can speak...” She found her institution compatible with her values because, for example, “Our program launched here has a really high profile of international human rights...” In some cases ethical issues in, and of, design became trigger points for these individuals, as it did for Laura.

I see... the... parallel in (to)... doing development work in emerging countries... this comes from my studies in global and human rights education and critical theory (which) has been fundamental in shaping my own philosophy of design and education... Social change requires that people change how they are in the world—their thinking, their feeling, their actions—and this is extremely personal.

George, whose first career was as a faculty member at a faith-based college, explained the ethical design implications of his background and philosophy.

I said, ‘Think about the amount of ink that is spilled on (a particularly contentious social issue)... versus treatment of the poor and the oppressed and the marginalized, and how (political) parties who are often... classified as Christian actually harm the poor; do little to best help them’... And I thought, here I was working for (a multinational ICT company) with \$21 billion in the bank... And there's this networking juggernaut and most of (the trainees) aren't yet thinking about how you are

actually shaping the society around you, with the technologies around you... That's partly because of my training in religious studies and actually my MEd (in adult education)... If I can angle things towards social justice... to get people to think critically... that's pretty important to me.

Not all instructional designers in post-secondary contexts have the personal freedom to be able to work only with clients with whose values and disciplines they are aligned, but designers with societal agency have found ways to engage the institution in the conversation. Perhaps this is because in reconciling their experiences, values and beliefs with institutional culture and expectations they have achieved a degree of moral coherence in which equity is an important element. For example, David was involved in a course re-design for the Pharmacy Faculty. The curriculum involved an animal care project, in which

There's a lot of issues... (of) treating the animals properly... I do see that as kind of animal slavery and... (it) leads to larger philosophical issues of 'what are beings?' Say every living thing has the right to be untouched and left alone... It's a bit of a complex question but on the whole, I can say, 'Yes, I think there is some need to use animals for research, but I would guess it's probably about 1% of what's actually going on, and we don't need to be doing all the unnecessary suffering.' So I had difficulties with that.

He reconciles the conflict between his own values and institutional expectations of him as an instructional designer by "let(ing) the main subject expert person know to some extent what I felt about that", and by encouraging a course design that included the issue as a learning opportunity.

### *Core values and learning designs*

So far we have shared stories of the experiences that have shaped the values of the designers we've identified as practicing through societal agency. How do these values influence the types of projects they choose to become involved in, and how are they reflected in their learning designs? We asked them to tell us about one project that best reflected their change agency. Denise, who worked with a faculty member involved with the World Health Organization (had)

a positive feeling because... where there was nothing in that area, we have eleven really good consultants... they have at least basic training to move ahead... After 2 years... there's been so much positive feedback... in the Faculty... and the International Union against Tuberculosis and the World Bank from this project...

Sandra, who referred earlier to the importance to building trust of respect for a client's pedagogical content knowledge, worked with a professor in veterinary medicine to create a virtual lab demonstrating the intubation of a horse.

First, students could see the 'inside' view of the movement of the tube, as well as the outside view of the response of the horse and the actions of the veterinarian... Secondly, in response to concerns raised by animal welfare groups, the college was looking for ways to reduce the number of times that the procedure was performed on live horses... As the team worked through the design and development of this project, the client began to see that further benefits could also be achieved.

Ultimately a socially agentic designer may be able to make an impact through actions that integrate other types of agency, for example, professional and interpersonal agencies. Yan and her clients created a family case study.

One of the characters...announced at the dinner table that she was an ovo-lacto-vegetarian and her father said, 'What the hell is that?'... I kind of wanted to set the stage. Here's a family that is struggling financially and in the case study the father loses a job... (later) the daughter is visiting the food bank at the student union. So we have a whole case study in terms of student hunger. We wanted to make the case studies relevant to student life and the fact that there are probably people on campus who don't have enough money for a balanced diet.

### *Instructional design as a subversive activity*

David suggested, "(part of) instructional designers as agents of social change...is subverting the traditional system." He was deeply articulate about societal change agency in a culture slow to respond to issues of inclusion and access. He could see how instructional designers "might do very good work in helping transform teaching in better ways for the elite." Acknowledging that distance education has been seen as "second rate education, as (serving) second-class students," he is disturbed by "people in the biz (sic) ...talking about a lot of these students as losers...who never would be qualified to get into a traditional university or college." David is disappointed that his research-intensive university lacks "that aspect of social mission." (In his unit, which is not Faculty-based) "we've been... providing access through social development programs...accepting quite a number of (alternative route) students to our (online) classes with the rest of the...students...and no one in the class knows that they're not (formally admitted) regular students."

Holding ethical stances and higher values can have profound effects at the personal, professional, and institutional levels. In the institutional view instructional design may not be so important on a grand scale, but the contributions made can have wide and profound influence in the long run. As an example, if we insist on giving marginalized populations authoritative roles in the cases we design, we may in the long run contribute to a new understanding of equality.

### Interactions among types of agency

Interpersonal, professional, institutional and societal categories of agency are not mutually exclusive; in fact, we speculate that they seldom work in isolation. As areas of agency interact, we use three levels to describe the types of interactions that take place: micro-level, meso-level, and macro-level interactions. These interactions can be based on coherent, incoherent or conflicting expressions of the types of agency.

#### *Micro-level*

Micro level interactions stay within the personal or professional contexts of instructional design performance, are typically local, intimate and concrete and often tied to particular projects, although the level of influence is bounded only by the size of the communities within which the practice occurs. Examples of micro level interactions include instances

where interpersonal dimensions conjoin professional dimensions. For instance, if a client advocates an instructional methodology that can interfere with learning, the instructional designer might draw on persuasion based on the trust within their relationship (interpersonal), but might also draw on the experiences of other instructional designers and the literature to recommend alternative approaches (professional). As agencies interact, so do the communities of practice that bound each type of agency. “As developers and designers, we then went back and said, ‘Ok, how can these learners feel valued? What can they bring to the learning that they feel is of value and how as a designer do you build on that?’ (Laura)?

### *Macro-level*

The interplay of societal and institutional agency occurs at the macro level of interaction. Macro level interactions are characterized by instances where institutional needs and goals interact with societal influence. For instance, if an institutional goal is to increase access to courses and programs, the societal influence might be the intention to increase the literacy and productivity of the population, and through that, effectively contribute to a robust economy. But in most cases in our research, macro level interactions revealed a recognition that institutional and societal issues interacted to allow the instructional designer to have a wider range of influence than other educational positions allowed.

I found it hugely satisfying that I could write materials that would affect more people than just my class. And I found it most annoying as a teacher that I could do a good job in my own class, and Joe Blow next door could do a really shocking job, and you know, we were having about the same kind of impact on about 30 people each. So I found that once I got into doing resources that I didn’t want to go back to teaching (Jeanne).

### *Meso-level*

Meso level interactions occur when interpersonal or professional agency engages institutional or societal agency. For example, if institutional goals are in conflict with individual goals, the effectiveness of any agency may be threatened. Interpersonal agency, for instance, might be based on advocacy for equitable treatment of French and English students, but institutional agency might emphasize marketing to one group to increase the cost-benefit to the organization. For example, Steve told a story about a campaign to get the central computing support group on his campus to make some changes in WebCT and student lab support to shift the orientation of the support group from emphasizing technology/security/software to emphasizing the faculty and students who use WebCT. The instructional designer spoke about “using the professors’ voices” to make these changes because they were politically aligned with the issue and in a stronger strategic position to influence change. The end goal was better learning support, and it was the instructional designer who was the catalyst for change at the intersection of personal and institutional levels of agency.

Another instructional designer spoke of paying attention to language in products, and how careful language can contribute in small ways to much larger societal concerns.

(The writers)... referred to this person who was really difficult, and said ‘of course he was the union rep.’ And just by saying that’s not a reasonable thing to do and

changing it... It's good for us to be informed and to be aware of those types of issues around stereotyping and to talk about goals and what we want education to be like... a lot of students are going to have to engage with that unit for a long time [Jeanne].

### Intentional and operational dimensions of agency

Although a full discussion of dimensions is beyond the scope of this paper, it became apparent that instructional designers make decisions that emphasize intentional dimensions and operational dimensions of their work. By intentional, we refer to those dimensions of instructional design that are related to the intentions, principles or values associated with actions, including personal judgments about what is significant, preferential, moral or ethical. By contrast, operational dimensions include the practical implications or the expression of particular intentions, principles or values. In other words, intentional dimensions deal with what we feel we should do, whereas operational dimensions deal with concrete actions or outcomes. We suggest that the greater the propinquity of intentional and operational dimensions of agency, the greater the possibility that decisions will be made within a zone of moral coherence (see Schwier et al. 2007).

In cases where there is agreement among agencies concerning the values, ethical and functional dimensions of agency, we suggest that the overall agency is operating in a zone of moral coherence. Where the agencies are incoherent or in conflict, we argue that the overall effect of agency at every level is tempered, and potentially negated. And instructional designers often find themselves navigating levels of agency that are in competition with each other, and the resolution of these interactions, if recognized at all, requires personal and moral courage.

We are reminded in our research that instructional designers feel responsibility for more things than they have authority to influence, and that they regularly find themselves in positions that require them to act beyond their authority, or in a vacuum of authority. On the verge of leaving her position after a series of deep staffing cuts were made in the organization left her the only designer, Barbara illustrates this dilemma in her concern about unfinished projects.

But I know what to do about those. I am burning the projects onto CDs and requesting the deans... sign a deliverable acceptance form. A couple of departments don't have a dean so the president will have to sign off on them. He feels so bad about our unit right now I think he might actually do it. Then at least someone will be thinking about what to do with those courses.

### Zone of moral coherence

We contend that, throughout all four types of agency, instructional design should be understood as a moral practice that embodies the "relationship between self-concept and cultural norms, between what we value and what others value" (Anderson and Jack 1991, p. 18). The data, especially the stories told by instructional designers, suggest that instructional designers think deeply about their practice and that their professional and personal identities are deeply intertwined. In other words, they prefer to practice within a zone of moral coherence. As moral agency implies action, we take Foucault's (1980) discussion of positionality in discourse as our understanding of the difficult work



implicated in moral coherence. Foucault argued that multiple subjectivities occur as the self is positioned and positions itself in socially and culturally produced patterns of language, or discourse. Discourses construe power relations through the passive positioning of self in one context and the active positioning of self in another (in Francis 1999).

At times instructional designers are required to practice outside that zone, for instance, when they are asked to deliver products they do not believe in or are assigned projects that challenge their identities as moral actors. In such cases, the moral incoherence causes dissonance for instructional designers, particularly when they feel powerless to challenge the source of the dissonance, and this may lead them to question whether they can stay in the profession. On the other hand, a strong sense of moral coherence among designers, clients, organizations, and ultimately learners contributes to a feeling of purpose and meaning. We suspect that compatible, shared interpretations of moral coherence contribute to shared identity and a more coherent community of practice, and ultimately to greater impact on the transformation of the institution.

### **Final thoughts**

Although the field is evolving, the dominant technical discourse of instructional design deskills the instructional designer in HE institutions in fundamental human ways. We maintain that instructional design is a moral practice that involves the ethical knowledge of the designer acting in relationship with others in a dialogue about how to create a social world of access, equity, inclusion, personal agency and critical action. Herda (1999) captures this notion of transformative social change when she credits language with a “generative role in enabling us to create and acknowledge meaning as we engage in discourse and fulfill social obligations... (that) are characterized as moral activities” (p. 24). What then are the implications for instructional design practice that is transformational; that contributes in significant ways to the public good?

We believe that designers are not technicians that primarily implement techniques and principles, but principled actors whose practices embody core values. What could we achieve if we were thoughtful, deliberate, and unapologetic in aligning design projects with the ethical knowledge of designers? If we developed a community in which the moral dimensions of practice were explicitly developed through reflexive dialogue? If we publicly explored the “conscious and unconscious influences on (our) practice and personal resistances to change” (Kugelmass 2000, p. 179) by asking ourselves, “Who am I, why am I practicing this way, and what effect does this have on others?” How might we redefine the curriculum in graduate programs of instructional design? In the meantime, since most graduate programs of professional preparation in educational technology are silent on these issues, narrative communities seem the best sites for this inquiry as designers rehabilitate their identities and “emplot” new narratives that effect structural changes in their institutions (Hartman 1991). The discussion of agency provides language for discussing the roles played by instructional design in the larger context of education and society.

Finally, we have offered a framework in which the instructional design profession may situate reflective action; a way to help us think about the moral agency we embody, working in relationship with others. At the study’s conclusion we invited ten instructional designers and scholars to a weekend retreat, “The Pigeon Lake Accord,” to critique the model and to share their stories of agency. We invite our readers to consider the unanswered questions that were raised there, including: Does “moral coherence” imply a value judgment of ID practice? How might this model influence practice? Is the model

developmental? How does this model align with a systematic organization of instructional design roles and tasks? Do designers in other contexts, for example, industry, share similar stories of practice? Are there cultural dimensions to ID models and practice, for example, will this model describe practice in North America, Europe, South Asia, Africa...? We invite you to join the conversation.

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